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# quickTerm 5.5.3

## User Manual Web Client

quickTerm©

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# 1 General Concepts

## 1.1 Our quickTerm Vision

quickTerm is a life cycle management system for terminology based on SDL MultiTerm or Acrolinx. The objective of quickTerm is to:

- Efficiently roll out terminology across an enterprise so that it reaches its target groups in an acceptable form
- Present terminology in an intuitive and easily accessible manner for general users
- Provide direct access to terminology databases and other search providers from Windows applications as well as web browsers and smartphones
- Establish a solid foundation within an enterprise for the development and coordination of terminology
- Extend the scope of the terminology to all relevant languages with a global, collaborative workflow
- Raise awareness of and keep the termbase constantly in the minds of colleagues through regular light-hearted tactics such as recommended entries, entry of the week, term quiz, etc.

quickTerm achieves its objectives by:

- Providing terminology quickly from any Windows application by pressing a hotkey (only when the quickTerm Client is used).
- Enabling terminology to accessed easily via a web browser, from tablets (quickTerm Web) or smartphones (quickTerm Mobile)
- Allowing new terminology to be suggested, feedback on existing entries to be provided, change and translation requests to submitted
- Allowing the approval process to take place "virtually" and collaboratively online, on a smartphone, or in the quickTerm Client
- Allowing "edit tasks" to be managed by the relevant specialists
- Supporting translation processes, including reviewing and approval loops

**Linguistic Note**

To optimize space and text flow, this document will use the masculine form only.

References to individual user types, such as "Terminologist" or "Approver", will always mean the entire user group, as these roles may obviously by carried out by several different people.

### quickTerm and Acrolinx

quickTerm can be tightly integrated with Acrolinx, too. There are 2 ways you can pass term requests ("Proposed terms") from Acrolinx users to quickTerm:

- Proposed terms can be imported in regular intervals into the term request list of quickTerm
- Starting with Acrolinx 4.1, calling the "propose term" feature of Acrolinx can take you directly to the term request dialog of quickTerm.

## 1.2 Brief "Terminology of Terminology"

To make it easier for you to work with quickTerm, it would be helpful to briefly explain the entry structure concept used in MultiTerm. This is generally accepted in terminology theory and is referred to as being "concept-oriented and term-independent". This means that terms, which represent the same concept, are contained within the same entry using the same ID. Homonyms - terms which by coincidence have the same working but mean something totally different (e.g. button on clothes vs. button on a GUI) are **not** stored in the same entry.

It is important to familiarize yourself with the notion of "concept", "language" and "term" if you want to be able to filter entries or terms and also understand approval and translation workflows.

### Concept

An entry in terminology always depicts a certain "thing" or "feature", independent of the actually linguistic representation (term). This "thing" can be described independently of any terms or even language. In the terminology, this abstract "thing" is referred to as a "concept".

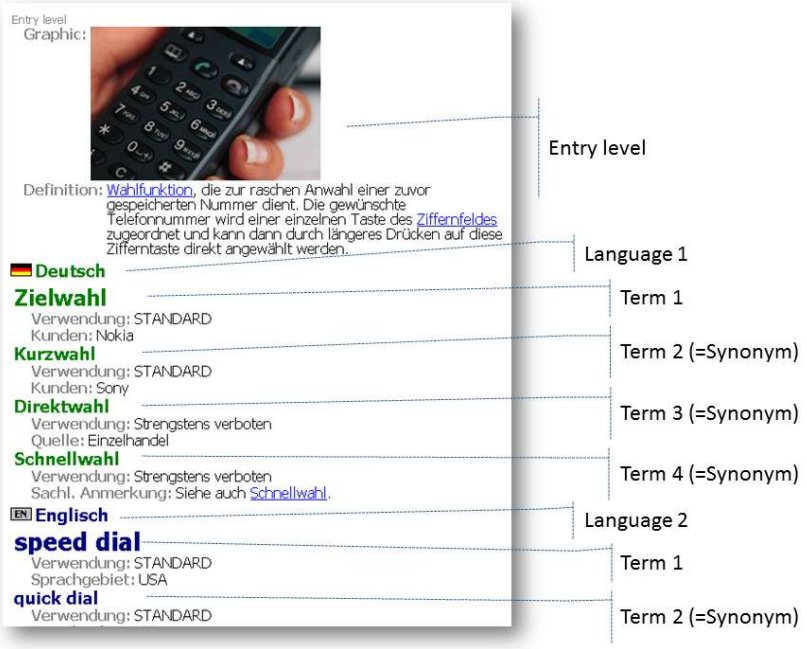
## Language

Different designations can exist in different languages for each concept. Not all languages are not available all the time.

## Term

If the designations are in written form (i.e., they are "words"), they are referred to in the terminology used as "terms". If there are multiple terms associated with a language in an entry, these are also referred to as synonyms. For example, chair and seat could be synonyms.

## An example

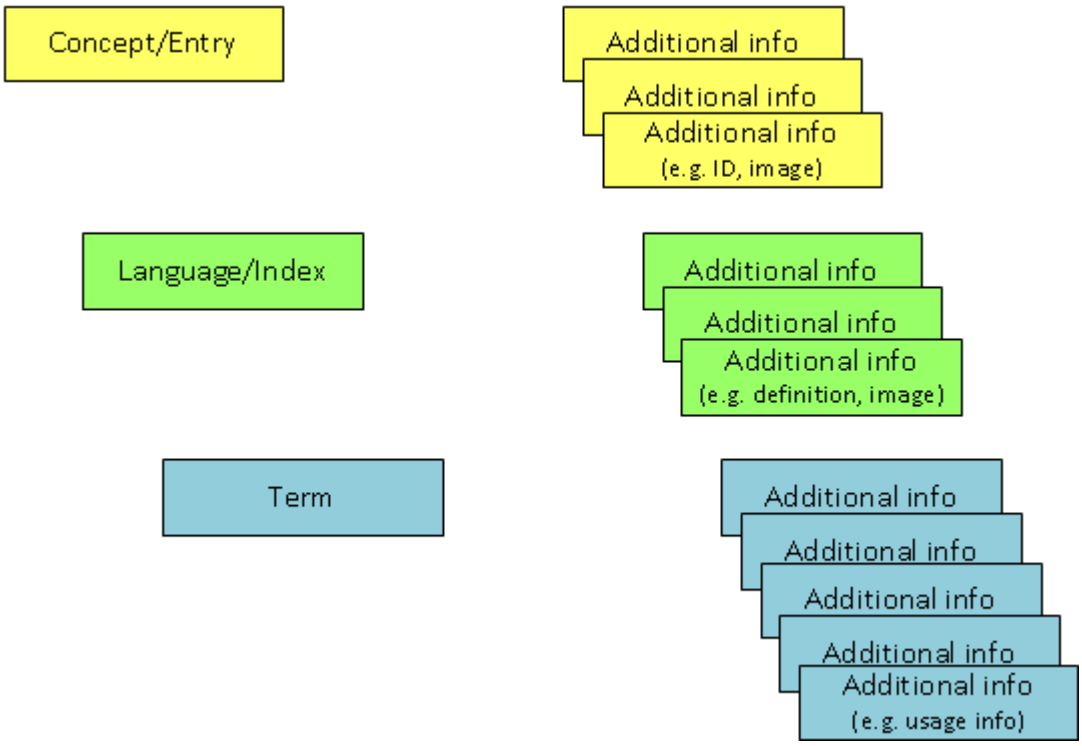



*MultiTerm Entry Structure*

As you can see, a MultiTerm entry has three levels:

- a concept level, on which can be found all the information that is always valid for the concept (=the "thing") in every language.
- One or more language levels
- one or more terms (term level)

  Additional information can be entered for each term, so as to be able to distinguish more clearly between the terms and, in particular, to clarify the differences in use.




*Schematic Entry Structure*

## 1.3 The quickTerm Workflows

In quickTerm, a new term is typically requested by some user and will then be processed: Additional information will be added by specialists, it will be translated in other languages, approved, etc. All these processes are moderated by the terminologist, who has the final say on any information in the termbase.

quickTerm distinguishes between requests and tasks.

### Requests

Requests can be submitted by all users of the termbase, provided that this option has been enabled in each case. The requests comprise:

- Term request: A completely new entry is desired
- Change request: An existing entry should be changed
- Translation request: An existing entry needs translating into an additional language
- Log terms: Not really a request, but a note to a user that a search was unsuccessful.

## Tasks

Tasks are always initiated by the terminologist. Exceptions are foreign language approvals that were created automatically during the translation process, or tasks created fully automatically by quickTerm Tools. The tasks comprise:

- Edit task [→ 25]: The terminologist "orders" specific data from a certain user group for an existing entry or term request
- Approval task: The terminologist sends a prepared entry to the different user groups for approval. This may also take the form of a fully automated process via quickTerm Tools.
- Translation Task: The terminologist sends an entry for translation into certain languages only. This may also take the form of a fully automated process via quickTerm Tools.

## Workflow Participants

Depending on how the system is configured, specific users can be involved in a workflow in one or several roles.

All users are divided into groups. These include approval and translation groups for the individual languages. It is also possible to define groups to perform an initial. mainly linguistic check on the content of requests.

When voting takes place with a group in a workflow, for instance the approval workflow, then one of several different voting procedures can be configured (see also chapter Approval task [→ 17]).

Approval, edit tasks and, of course, translations run as separate workflows in each language. It is therefore entirely possible that an entry can be approved in German, awaiting approval in English, in progress in Italian and only just submitted for translation in Spanish all at the same time. This also means that specific approvers are defined for each language and can automatically only approve "their" language. Similarly, translators can only make suggestions or receive tasks for "their" language.

Furthermore, it is possible in quickTerm to display only those languages that have been approved for each term (status filter at language level).

## Logging Workflow Status in the Termbase

The workflow status can also be optionally logged in MultiTerm or Acrolinx (See MultiTerm Approval Documentation ).

### Typical sample workflow

This is what a workflow in quickTerm could typically look like:

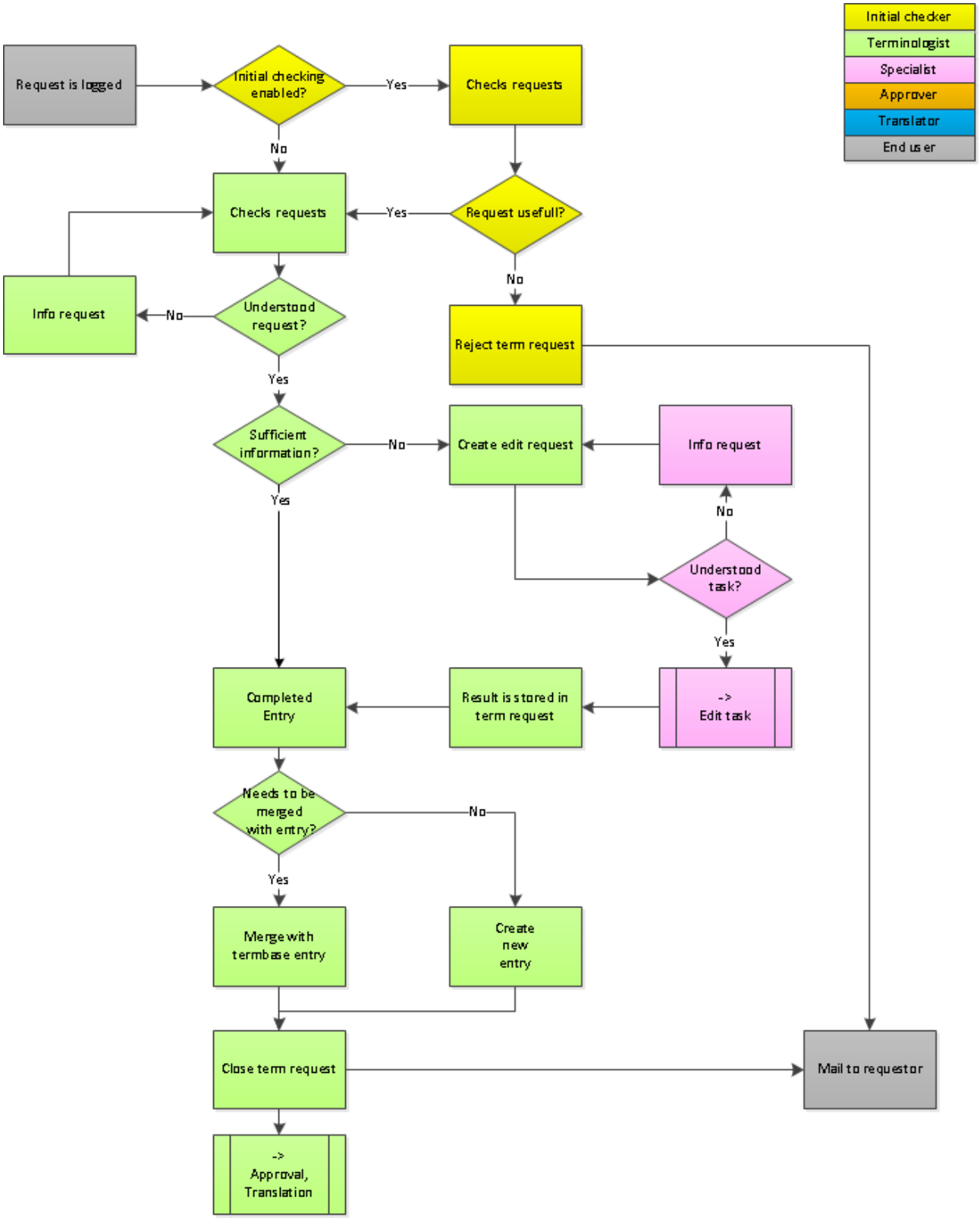
1. A user requests a term.
2. A linguist or other "initial checker" verifies the request and sends it on to the terminologist.
3. The terminologist delegates it to a subject matter export for detailed information.
4. After compiling all the initial information, the terminologist creates the initial entry in the termbase.
5. The terminologist then sends this entry into an approval workflow.
6. The result of each vote (approved or rejected) is recorded.
7. The terminologist then sends this entry into translation.
8. The foreign-language equivalent is added and proofread.
9. Target-language approvers decide whether the equivalent is appropriate.

The exact sequence of the steps is very flexible and can be adjusted to fit your exact needs.

## 1.4 Requests

Requests can be submitted by all quickTerm users, provided that this option has been enabled for these users.

## 1.4.1 Term request




*"Term request" workflow*

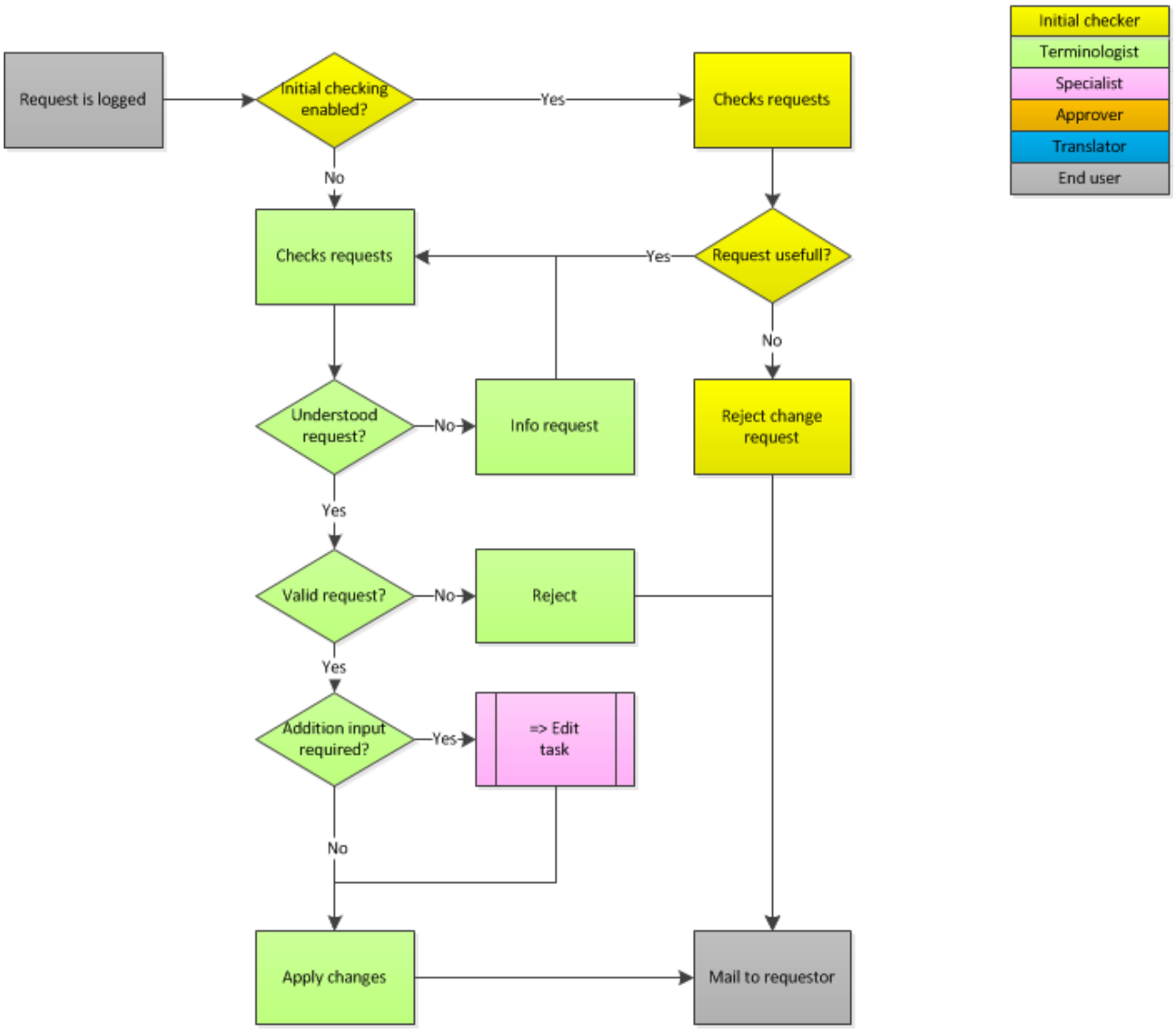
Every user who has had the option enabled may submit a term request in quickTerm. The information that the user can or must fill in when submitting a term request can be configured for each user group. Term requests may be monolingual or bilingual, depending on the user authorization.

Depending on the configuration, term requests are first sent to the initial checker (who if applicable forwards the term request to the terminologist), or are sent straight to the terminologist. The terminologist decides whether the request should, in principle, be added to the termbase. The terminologist can delegate the request to a specialist for actioning, or create the entry in the termbase and then send it for approval.

As soon as the term request is created, quickTerm checks whether this term already exists in the termbase or has been previously submitted as the subject of a term request (including requests that have been rejected!). This prevents duplicate term requests from being filed.

An e-mail is sent to the requestor to inform them of the outcome of the request.

## 1.4.2 Change request




*"Change request" workflow*

Every user who has had the option enabled may submit a change request in quickTerm. In doing so the user is able to enter different values into the relevant fields in an input screen. The terminologist receives these requests with a clear overview showing the "change history" and decides what to do with the request:

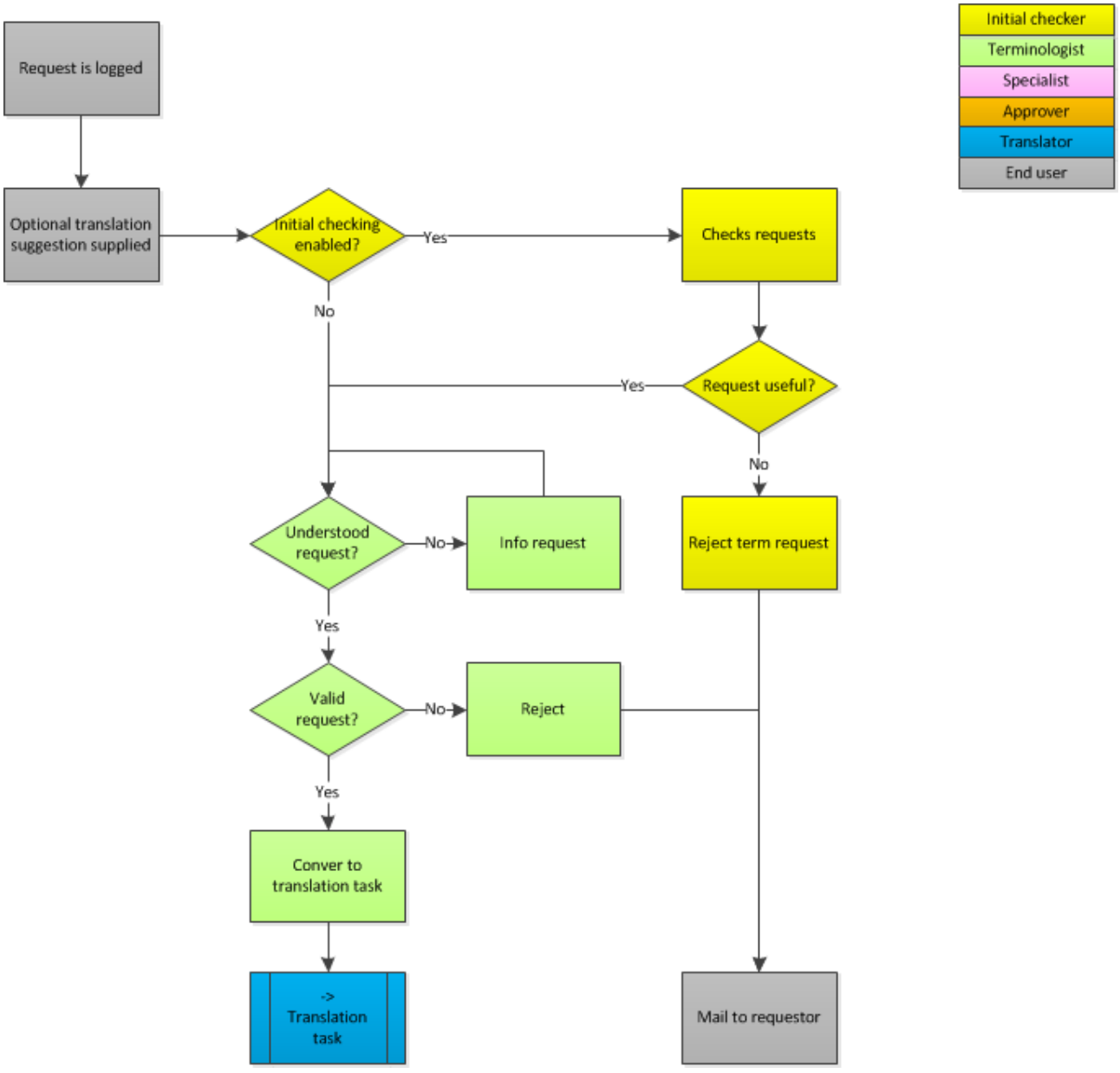
- Reject change
- Accept change and update termbase immediately
- Forward the change as an edit task to the specialists for voting

If the terminologist wants to change something in the entry, there are two options, depending on the configuration:

- He can directly edit the entry.
- He can file a change request to himself and accept it immediately. This is virtually the same as "documented" editing of an entry.

It enables the terminologist to edit the termbase from devices on which the MultiTerm or Acrolinx software is not installed.

## 1.4.3 Translation request




*"Translation request" workflow*

Every user who has had the option enabled may submit a translation request in quickTerm. The user must specify the language in which the term is to be translated, but he may also propose a translation as well. The terminologist can then reject this request or forward it as a translation task to the relevant team.

### 1.4.4 Auto-Logging Unsuccessful Searches

quickTerm internally logs all unsuccessful searches. Since many unsuccessful searches are caused by errors such as typos or searching in the wrong source language, two threshold values may be set: one for the logging process itself and one for an automatic term request.

This allows on the one hand for a minimum number of unsuccessful searches to be reached before the search term appears in the list of logged terms.

On the other hand, an automatic term request can be configured. For example, the system can be configured so that once a term has been searched for 25 times without success, a term request is automatically submitted to the terminologist. The content of this automatic term request can also be defined (apart from the actual term itself).

## 1.5 Tasks

Requests are mostly submitted by terminologists. Exceptions are requests generated by the system:

- Approval tasks that are created automatically as part of a translation process (if configured)
- Fully automated requests created via quickTerm Tools

### 1.5.1 Approval task

In voting processes, the system can be configured so that only one group member has to cast a vote, a certain number of group members have to cast a vote, or a certain number of group members have to cast a positive vote before the vote from this group is accepted as complete.

quickTerm distinguishes between a source and target language approval workflow.

- The "source language approval workflow" is used, when the terminologist sends an entry into approval in a language that already exists in the termbase. Normally, this is the source language. The terminologist will be the final approver for this workflow.
- The "target language approval workflow" is used when an approval process is automatically started as a result of a translation. In this case, it is not the terminologist who gives the final approval, but the main approver of the target language.

Any language can thus be processed by either of the two approval workflow types. It just depends on how it is initiated.

#### 1.5.1.1 The Approval Concept

##### Approval at the Language Level

In the quickTerm philosophy, approval always occurs at the language level and not at the term or entry level.

- The workflow only makes sense within the context of all terms of a given language: individual terms (synonyms) are thus evaluated by the terminologist and provided with usage information and other information. The total context of a specific language, including information on which terms are the preferred terms and on what occasions, will then be approved by the approvers responsible.
- To have an approval workflow based on entry level makes no sense, because no approval group or terminologist will be able to speak or approve all languages at once.

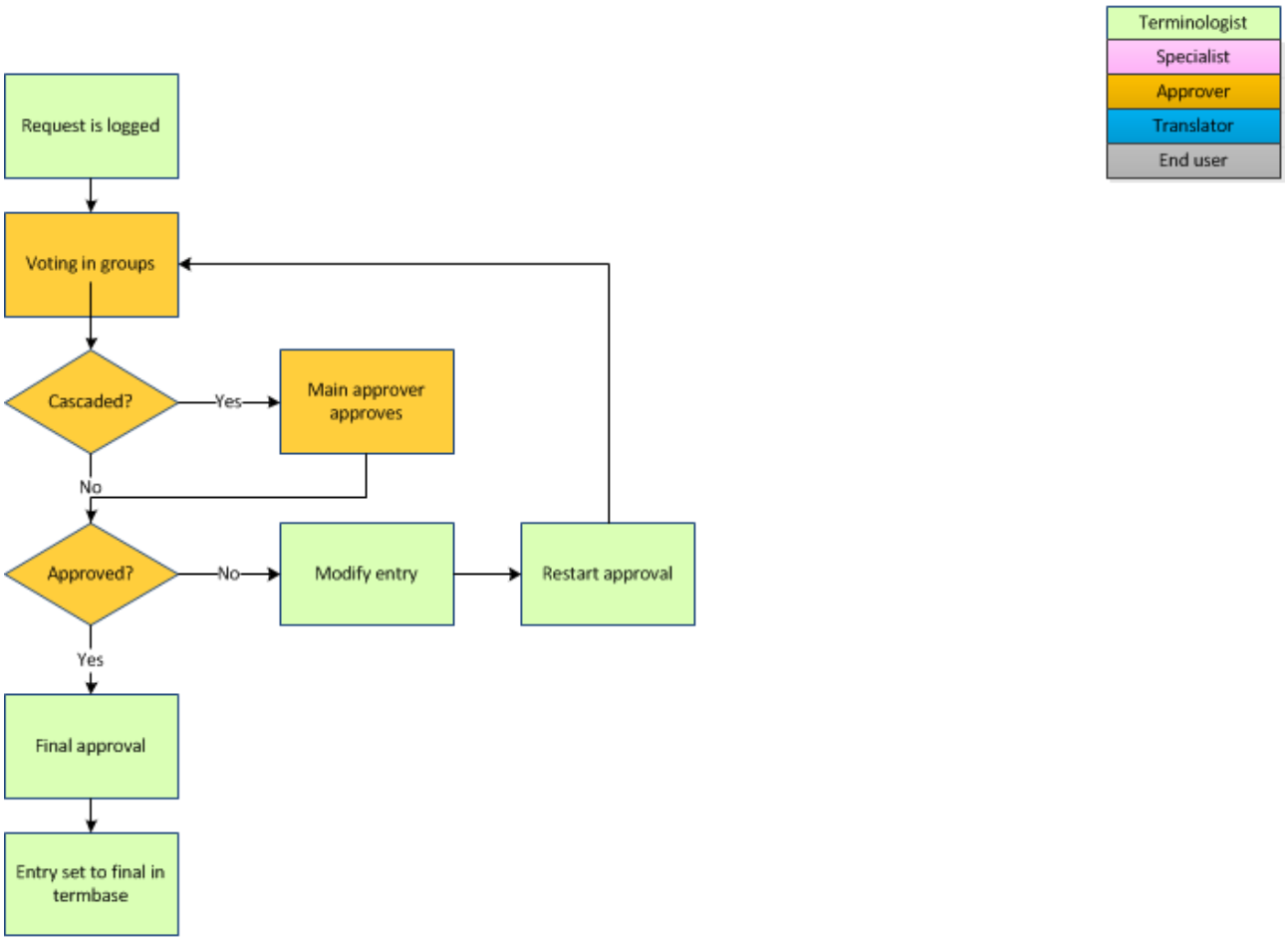
##### Renewed Approval for Changes

If an approved entry is changed (for instance, a term is added), then the entire entry has to be re-approved, because due to the new constellation, the preferred term or other details might shift.

##### Restarting Approvals

If desired, individual entries can be set to "Restart approval process". Once a specified period of time expires, quickTerm will then remind the terminologist that the validity of this entry may have to be checked.

## 1.5.1.2 Source Language Approval Workflow




*"Source language approval task" workflow*

The approval workflow for the "source language(s)" comprises a three or four-stage process:

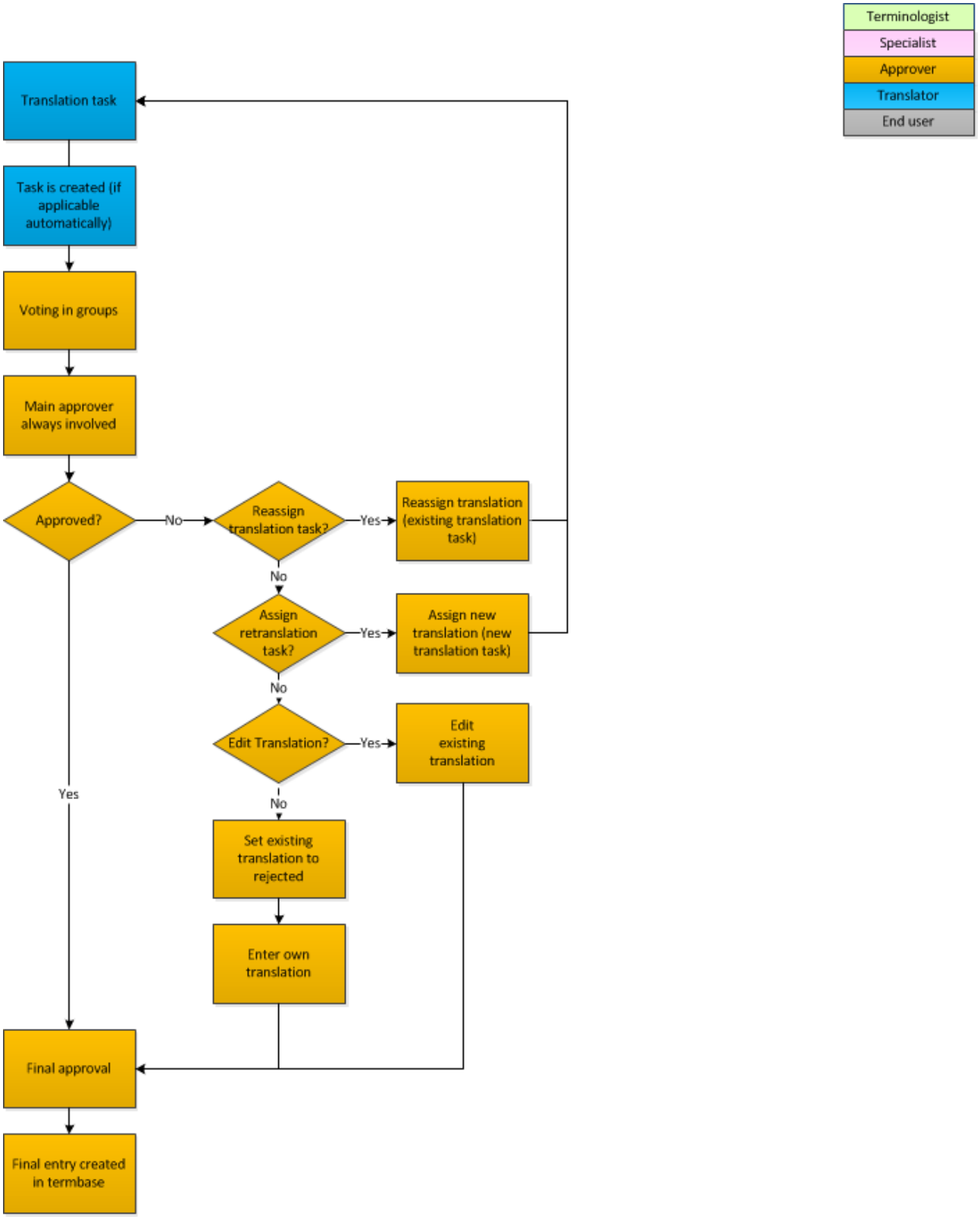
1. An existing entry, which has not yet been approved, has the status "New". The terminologist can send such an entry for approval in each language at a click of the mouse. This step can also be automated using quickTerm Tools.
2. The approval task process runs as soon as the approval has started. The respective users receive a notification via e-mail and the approval tasks received appear in the Request management screen in the quickTerm Client.

   The approvers can then approve or reject the individual entries, or abstain from voting, by clicking on the respective buttons. They can also "chat" with each other using the notes function or send a question to the task initiator or any other user. It is particularly useful to enter a note when rejecting an entry or abstaining from voting.

If configured, quickTerm can automatically document the voting process and manage the status information in the termbase. This means that the approvers do not have to be familiar with the specifics of the termbase. Neither is it necessary to install any terminology software locally on the approver's PC. Nevertheless the exact approval processes can still be viewed in the termbase.

3. As soon as all the approvers for a language have approved an entry, a main approver can optionally grant final approval or reject the entry (cascaded approval). The status is then "All approved".
4. If the main approver has also voted, the terminologist receives a notification via e-mail and can either correct the entry in the respective language and restart the approval loop, or give final approval to the entry directly in his quickTerm task box.

# 1.5.1.3 Target Language Approval Workflow




*"Target language approval task" workflow*

The approval workflow for the target language(s) comprises a three-stage process:

1. A translator makes a translation suggestion. This is either initiated by the translator or occurs as a result of a translation task. Even the translation process itself may be broken down into several stages with a translator, reviewer and lead translator. It is possible to configure the approval process following translation (see Field Access Settings):
   - Optional

     When finalizing the translation task, the translator can decide whether to start an approval task.
   - Required

     When the translator finalizes the translation task, quickTerm automatically starts an approval task.
   - Disabled

     If this option is set, it is not possible for an approval task to be assigned. In this case, you should configure the translation suggestion dialog so that the approval value is also written directly to the termbase. This is done by setting the default value of the respective fields in the field access configuration (see chapter Field Access Settings).
2. The voting process is identical to that of the source language approval process.
3. Once all approvers have finished their tasks, the main approver can perform one of the following actions:
   - He can give his final approval
   - He can edit the translation and then give his final approval
   - He can add an alternative translation and then give his final approval
   - He can send the the translation back to the translator to be edited
   - He can ask for a completely new translation suggestion from the translator

Approval for the translation is independently assigned by quickTerm as required, so, unlike approval tasks for terminologists, you cannot manually select which approver groups should be included. By default all approver groups that are assigned the relevant language are included. If you want to involve other approver groups for different types of entries, you can configure this so that it is "implicitly" linked to specific criteria, i.e., to a department or specialist area. For example, the system can be configured so

that every entry allocated to department X can only be approved by approvers from that department. (For more details see the Specialization Settings chapter in quickTerm configuration).

### 1.5.1.4 Approval Methods

Approval can be carried out in three ways:

- In contrast to the two voting procedures, only one member of a group has to grant approval in the First-Wins procedure in order for the whole group's approval to have been given. It is also possible to specify whether other group members can disagree with a "colleague" and reject a previously approved request, or whether a vote that has been cast immediately finalizes the approval task and blocks all other group members (enforced First-Wins). In the event of a conflict, the original vote will be invalidated in quickTerm; however, all agreements or rejections will remain documented in the termbase.
- In contrast to the first wins procedure, the minimum agreement procedure requires a specific number of users in a group to approve an entry in order for the group's approval to have been given.
- The minimum votes procedure dictates that a certain number of total votes has to be cast for each term before a decision (agree or reject) can be reached. Abstentions are not counted. We recommend specifying an odd number of necessary total votes so that the number of votes for and against the proposed term are not identical, as the system would then be unable to reach a majority decision.

The Administrator specifies whether a group uses the First-Wins or voting procedure to approve entries under Approval settings in the group management.

### 1.5.1.5 Abstentions

As well as approving or rejecting an entry, it is also possible to abstain from voting. The meaning of an abstention is either "don't mind" or "don't know" and is a way of documenting the user's abstention and also of informing other users involved in the voting loop that he has abstained. Abstentions are ignored in the decision-making process. This applies for both approval tasks and edit tasks. Ideally a reason for the abstention should be provided through the chat function (e.g., "Not my area of expertise").

### 1.5.1.6 Documenting approval workflows in the termbase

quickTerm can document the entire approval process in the termbase. In order for it to do so, you must include the relevant workflow fields in the termbase definition at language level (for further details see Termbase Settings in the Configuration chapter).

**Documenting this in the termbase is purely optional!**

Documenting approvals in the termbase is not essential from a quickTerm perspective. Its only purpose is to allow all users, not just the quickTerm terminologist, to see the approval status and history in the termbase itself.

### 1.5.1.7 Revoking an Approval

When an approval is initiated, quickTerm checks whether the entry has already been approved in the particular language or in another language. If that is the case, the approval process can also be optionally repeated for these approved languages. The reason for this is that a change made in one language can also bring about changes in other languages.

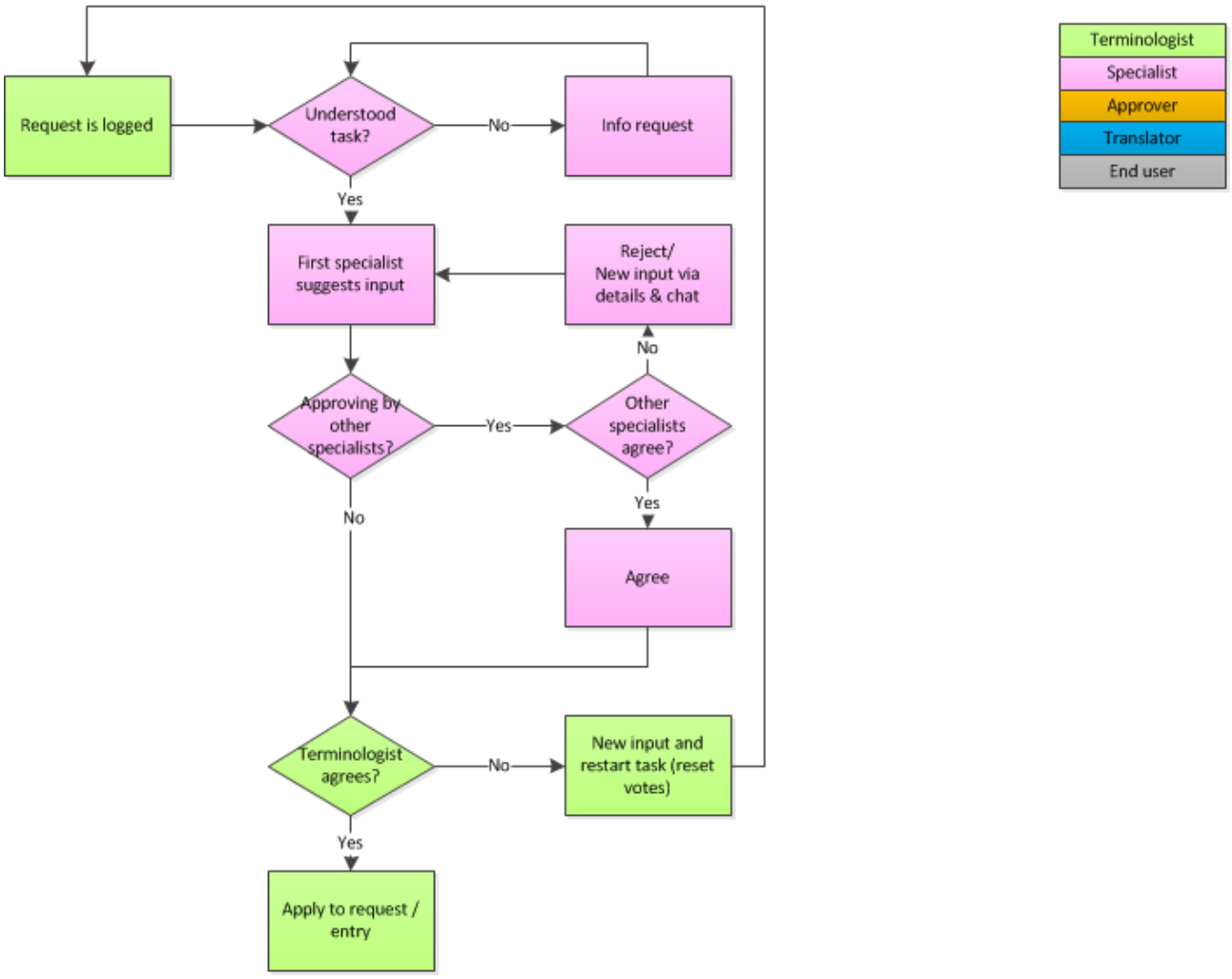
quickTerm checks the workflow status in quickTerm and in the termbase, as this information may differ.

#### Notification of New or Changed Approved Entries

When an approval process starts, all groups that have "subscribed" to these notifications automatically receive an e-mail informing them that an entry has been sent for approval, regardless of whether the entry is new or one that has already been approved.

Likewise, at the end of the approval process, all groups that have "subscribed" to these notifications will automatically receive an e-mail informing them that an entry has been approved.

## 1.5.2 Edit task




*"Edit task" workflow*

The terminologist can send individual entries, term requests or for instance change requests to certain user groups ("subject matter experts") in order to have them provide particular input, for instance into certain fields of the termbase.

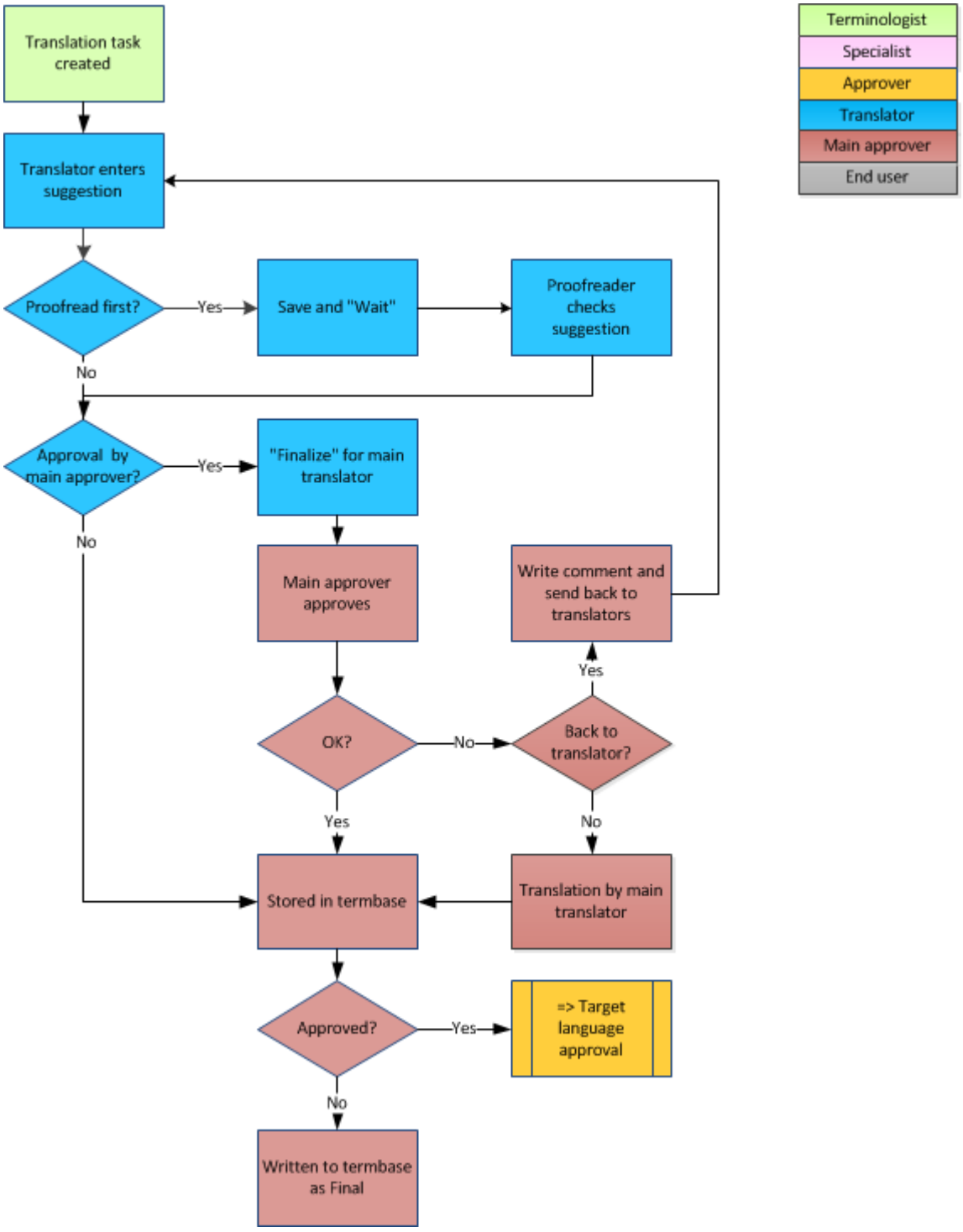
The recipients of such tasks could be any of the user groups (e.g., the approver groups). All that needs to be configured is the option that allows the group to receive edit requests.

For each request, the terminologist can select specific fields that the specialists must complete. They then have to enter the data in an Editor window. If the task is sent to a group with several members, these may then follow the same voting procedures as used for the approvals workflow.

In voting processes, the system can be configured so that only one group member has to cast a vote, a certain number of group members have to cast a vote, or a certain number of group members have to cast a positive vote before the vote from this group is accepted as complete.

As soon as a decision has been made, the information is returned to the terminologist, who can then either update the term request or termbase entry, or reject the decision and request that the task be repeated.

## 1.5.3 Translation Task




*"Translation task" workflow*

There are different ways to add multilingual terms to a termbase.

### Multilingual term requests

In addition to monolingual term requests, translators can also submit multilingual term requests. These term requests are first processed by the terminologist, just like monolingual term requests. As soon as the terminologist has created the term request in the termbase, they can send it for approval (optional).

### Translation suggestions

If a translator comes across a monolingual entry in MultiTerm, for example in the terminology window of SDL Trados, they can look up the term in quickTerm and submit a translation suggestion. This will be created directly in MultiTerm and an approval request goes out to the approver of this language either automatically or at the request of the translator. At the end of the approval process, the translator can optionally be notified of the result.

### Translation tasks

As an alternative to the translation workflows that originate with the translator, the terminologist can also send specific entries for translation. In this case the translator receives a notification via e-mail and can process the requests in his Request management screen and submit a translation suggestion for each translation task.

Depending on the configuration, there can be a proofreading workflow before actually sending the translation suggestion off to the approver. An example scenario here would see a translator from the group making a suggestion that a second translator checks. The second translator then forwards this suggestion to the "lead translator" for review. He then saves this entry in the termbase and, depending on the configuration, passes it on to the approver.

### Translation Suggestions for Existing Entries

Depending on how the system is configured, translators can also submit translation suggestions for entries that have already been "translated" and approved. This automatically starts a new approval process.

## 1.5.4 Feedback

All authorized users can provide feedback on terms. This feedback is collated in the terminologist's task list.

### 1.5.5 Request Management

In the "Request management" area, the tasks concerning the user currently logged into quickTerm are divided into three areas:

1. *Assigned tasks*: Lists all the tasks currently assigned to this user for processing. For a terminologist, these may be term requests, feedback, final approvals, etc. A translator may see translation tasks, etc.
2. *All my tasks*: Lists all the tasks in which the user is involved, regardless of whether they are currently assigned to him. For example these could be all term requests (including those that the user himself has initiated), approval tasks (including already closed ones), etc.
3. *User-specific tasks*: After the first two standard tabs, a series of user-specific tabs list individual tasks by type, e.g., all term requests, all approval requests, etc. There may also be additional functions available that are applicable only to these task types.

#### 1.5.5.1 User-Defined Task Category

quickTerm allows a user-specific field to be incorporated into every task. Possible uses of this function can be to filter tasks by specialism, or to select tasks by project number, etc.

This field can either be filled entirely at the user's discretion, or "hard-wired" to a specific termbase field, such as "Department".

## 1.6 Collaboration

Being a collaborative workflow system, quickTerm offers various means of communication between the participants of a workflow.

#### Comments and Questions (related to tasks or requests).

To support collaboration, users are able to call on the following functions within a workflow:

- Information requests

  By selecting "Question" and a direct recipient group you can send a question directly to a particular group. Note that only those groups are available which have been allowed to use the communication feature.

Doing so not only adds the question to the respective task, but also creates a task for the recipient group. The response, which is provided as part of the new task, is also noted in the original task/request.

- Comments

  By selecting the "Comment" option, a note is added to the respective task/request.

The information requests (and their responses) and comments can be seen by everyone involved in the workflow.

To send questions or comments, click on the "Send" button.

### Live chat

The Live chat function can be used to discuss tasks and requests with other quickTerm users.

## 1.7 Social Terminology

Social terminology covers a range of functions that the terminologist can use to increase the attractiveness and hence the usage, distribution and acceptance of the termbase. As with websites, topicality and the "new" factor are critical to generating a lasting interest in the information in the termbase among the user community.

The social terminology features are only available in quickTerm Web and include:

- Recommended and liked entries
- Term of the week
- Term quiz
- Live chat

### 1.7.1 Recommended and liked entries

The terminologist is able to "recommend" individual entries. These are displayed as a separate list in quickTerm Web. Thus frequently misused entries or entries with a particular topicality can be actively promoted. Users can click on these entries and view them in the entry window. Of course the terminologist can remove recommended entries from the list, as well.

Every user can "like" an entry. The "likes" are counted and the corresponding entries are shown in the liked entries list. While the terminologist has no direct access to individual entries in the likes list, he is able to completely reset the entire list. Also, the maximum number of "liked" entries shown in the list can be set.

### 1.7.2 Term of the week

The terminologist can prepare a piece on a special entry and publish it in quickTerm Web as "Term of the week". In quickTerm these are managed using special information fields, linked to an entry and can be published using different style sheets. There is only ever one term of the week active at a time, though users can scroll back through "old" terms of the week.

### 1.7.3 Term Quiz

In a similar manner to the term of the week, the terminologist can also publish a term quiz on quickTerm Web. A term quiz is a set of questions asked in sequence. Each question has four possible answers, one of which is correct.

These questions are written in quickTerm and collated as "quizzes". The user is presented with a choice of four possible answers for each question. After he has selected an answer, he is told whether he was right or not. The quiz ends with a set of statistics showing how many questions the user got right and how many were wrong.

There is only ever one term quiz active at a time, though users can scroll back through "old" quizzes.

### 1.7.4 Searching in Other Sources

quickTerm also permits other search providers to be configured in addition to MultiTerm and Acrolinx. These are displayed in the results list alongside the actual MultiTerm or Acrolinx matches and can be selected just like the entries in the termbase.

While it is primarily search providers such as Leo, Linguee, Pons, IATE, Wikipedia, etc. that were considered for this function, company internal search engines like Sharepoint text search can also be configured as search providers. Naturally this can provide a significant boost to quickTerm's qualities as a reference program and therefore the usage of the termbase.

# 1.8 Administrative Functions

quickTerm can be configured to provide the terminologist with a range of administrative functions. These include version management of the termbase and the ability to compare versions. A task summary can also be viewed and even automated (using quickTerm Tools) in the "Reports" area of quickTerm.

## 1.8.1 Multi-Tenancy

quickTerm is a multi-tenancy system. This is of particular interest in hosting scenarios. quickTerm can be configured completely differently for each client, right down to a dedicated theme in quickTerm Web. Different termbases can of course be included on a client-specific basis and different users and groups created. The single restriction is that only one MultiTerm server can ever be accessed by each quickTerm server. However, you can set up a different MultiTerm user for each tenant/client in order to prevent entries or e.g. field structures in the termbase of client A appearing in the configuration of client B.

Only the global administrator can create a new tenant. As a "client administrator" you can configure the users within your own tenant only. Both the client admin and the global admin can access these features. This prevents unauthorized access to your data.

## 1.8.2 Reporting

### Version Comparison, Snapshots

Depending on the configuration on the server itself, quickTerm can record a "snapshot" of the current data in the termbase at regular intervals. In the quickTerm Dashboard the terminologist is able to compare the terminology in the individual snapshots against each other. This allows him, for example, to find changes over a certain period of time, or to find out when a specific change was made. quickTerm first lists all the entries that were changed within the selected period. The terminologist can then filter the results by language or change type. He will then be able to "drill down" in the "results list" until only the change he is interested in is displayed.

From this results view the terminologist can also send some or all of the entries for approval again, send them to the translators to check, or even reset a term, language, entry or the entire termbase back to a certain state.

#### Timeline

Apart from this precise change tracking feature, the terminologist can also view a graphical representation of the termbase growth. This curve shows both the number of entries in total, but also the entries per language and terms per language.

#### Statistics

quickTerm offers several statistics for all the workflows running in the system. This includes search access, term requests, approval requests, translation requests. Different kinds of data representations can be chosen depending on the kind of data available.

### 1.8.3 quickTerm Tools

quickTerm Tools is installed on the quickTerm server as part of the quickTerm server installation package. It performs the following three tasks:

- Automatically starts approval tasks
- Automatically starts translation tasks
- Imports term requests from XML or CSV files

#### 1.8.3.1 Automatically start approval tasks

"Tasks", such as automatically starting approval tasks, can be defined in quickTerm Tools. These tasks can then be started automatically using Windows Scheduler, but can also be started manually.

Parameters can be defined that determine which conditions an entry has to meet before it can be sent for approval. For example, the system can be configured so that all entries with the workflow status "New" and that also contain at least one preferred term and at least one explanation or definition are sent for approval. The respective groups, etc. to which the approval task has to be sent can also be configured.

### 1.8.3.2 Automatically start translation tasks

"Tasks", such as automatically starting translation tasks, can be defined in quickTerm Tools. These tasks can then be started automatically using Windows Scheduler, but can also be started manually.

Parameters can be defined that determine which conditions an entry has to meet before it can be sent for translation. For example, the system can be configured so that all entries with the workflow status "Final" in the source language and that also contain at least one preferred term and at least one explanation or definition should be sent for translation. A threshold value can also be defined to specify the number of applicable entries that has to be reached before a translation project is started. The respective groups, etc. to which the translation task and subsequent approval task have to be sent can also be configured.

### 1.8.3.3 Import Term Requests

This option enables term requests from external systems to be imported into quickTerm. For example, terms suggested by the content quality checking system Acrolinx can be transferred to quickTerm. Instead of importing old data from Excel lists directly into MultiTerm, it is possible to import term requests into quickTerm; they can be systematically processed and will only appear in MultiTerm once they have been checked.

## 1.8.4 Automatic Client Update

quickTerm supports a server-based rollout of client updates. Not only is the client updated to a newer version, but customization updates (e.g., new icons, language flags, etc.) are also supported. The updates are released as a client package that is installed on the server. Once quickTerm is restarted, the new version is entered into the database. On every startup, each client compares its version number with the version number on the sever.

# 2 Logging In and Logging Out

## Anonymous login

You can configure quickTerm Web so that a pre-defined user, i.e., an "anonymous" user, is logged in automatically as soon as the website is accessed. In this case, the user is taken straight to the search screen.

The basic settings, such as GUI language, source and target languages, and search mode, can be changed as follows:

a) Unlock the end user's profile in Group management in the desktop client

b) Log into the web client as anonymous user

c) Change GUI language

d) Log off from the web client

e) Finally, lock the user profile again in the desktop client.

## Named login

You will be taken directly to the login screen if:

- No anonymous login has been configured
- You click on the link that takes you directly to the login screen, or
- You click on "Logout" in anonymous mode.

On the login screen you can then log in to quickTerm Web using your user name and password, just as you would do in quickTerm Client. The prerequisite for this is that the administrator has already added you as a user.

*Login screen*

a) Enter your user name and password.

b) Select the GUI language.

c) Click on "Login".

d) If you have access to several clients, a popup window appears in which you can select the desired client. Clock on "Connect".

⇨ quickTerm will log you in.

You can skip the login screen the next time you start the program by allowing quickTerm to "remember" your user name. To enable this function check "Remember me" on this computer.

It is also possible to open quickTerm Web with parameters, for example, directly logging in a certain user, or performing a search. You can find a more detailed description in quickTerm configuration.

## Logout

Depending on your configuration, there are several ways you can log off:

- Click on "Logoff" in the right upper corner.
- Click on the text "Welcome [Username]" and then click on logoff.

You will be taken to the login screen. You can also simply close your browser. The quickTerm server notices this after a few seconds and logs you out automatically.

quickTerm saves all of your settings when you log out, so that you find the program exactly as it was when you log in again. An exception to this is if the administrator has disabled user profile updates. This setting is normally used for anonymous web access.

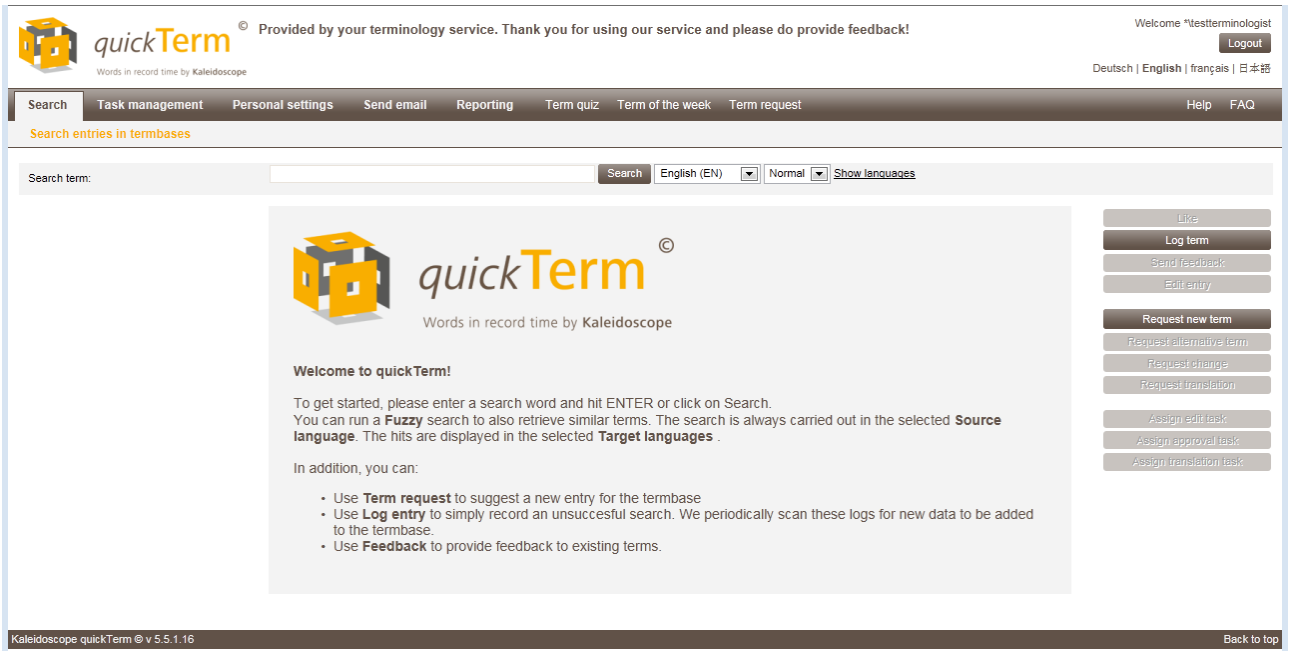
**Automatic logout upon closing the browser**

If you close the browser without logging off from the quickTerm server, then 15 seconds after closing the browser you will be automatically logged off.

**Automatic logout upon inactivity (concurrent user license)**

If the quickTerm client registers a 2 minute period of inactivity, it automatically logs off to free up the concurrent user license for another end user. Once you become active again, you will be logged back into the server automatically.

# 3 The quickTerm Web User Interface


quickTerm
Words in record time by Kaleidoscope
Provided by your terminology service. Thank you for using our service and please do provide feedback!
Welcome *\testterminologist
Logout
Deutsch | English | français | 日本語
Search
Task management
Personal settings
Send email
Reporting
Term quiz
Term of the week
Term request
Help
FAQ
Search entries in termbases
Search term:
Search
English (EN)
Normal
Show languages
quickTerm
Words in record time by Kaleidoscope
Welcome to quickTerm!
To get started, please enter a search word and hit ENTER or click on Search.
You can run a Fuzzy search to also retrieve similar terms. The search is always carried out in the selected Source language. The hits are displayed in the selected Target languages .
In addition, you can:
Use Term request to suggest a new entry for the termbase
Use Log entry to simply record an unsuccesful search. We periodically scan these logs for new data to be added to the termbase.
Use Feedback to provide feedback to existing terms.
Like
Log term
Send feedback
Edit entry
Request new term
Request alternative term
Request change
Request translation
Assign edit task
Assign approval task
Assign translation task
Kaleidoscope quickTerm © v 5.5.1.16
Back to top

*The quickTerm User Interface*

The quickTerm user interface is intentionally kept simple so that it is easy for non-terminologists to work with too. As you can see, the roles of the logged-in users are shown in the header above the Logout button. Alternatively, the client administrator can also change the settings so that the login information and GUI language are integrated in the menu. Instead of the role, the client administrator can also choose the user login name, user name, group alias, or also <none> to be displayed as the login information (see Configuration of quickTerm Web). The "Logout" button can also be removed by the client administrator for anonymous end users or generally for all logged in users accessing the program via the web. Any entry can be printed in the appropriate layout using the "Print entry" ( ) icon at the top right. Three additional icons in the same place enable you to Send an entry by e-mail ( , if this has been configured), show direct link to this entry in a popup ( ) - this can then be copied, as it is plain text - or also *refresh* ( ).

The commands and options available depend on your role in the quickTerm workflow, and also the configuration. Numerous commands can be shown or hidden by the administrator. For this reason, some of the commands described here may not be available to you.

The entire look and feel of the Web application can also be adapted to your company CI. This means the screenshots may differ in design from "your" version of quickTerm Web.

## Settings at first login

When you log in to quickTerm Web for the first time, select from the search bar the source language that you would like to search in and all the languages you want to see in the entry ("Target languages"):

*"Select target languages" dialog*

You can also define the sequence in which you want to display the languages.

**Language selection**

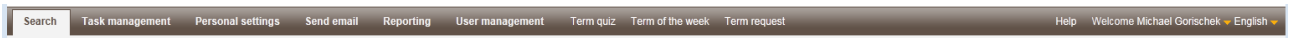
The changes will be reflected in your next search results.

## Information in the header

In the left upper corner, the quickTerm logo is displayed. You can change this for instance to a custom termbase logo in the desktop client´s WEB configuration. Next to it, a customizable text is displayed.

If the client administrator has configured the settings accordingly, the logged in user is shown at top right. Underneath you can log out. Beneath the logout button on each screen, the GUI language can be changed. Alternatively, the client administrator can change the settings to incorporate this information into the menu.

## Navigation




*Menu bar*

The navigation tabs are located just below the header information. Here you can select which quickTerm work area you would like to work in. There are several areas at your disposal depending on your user role and the way quickTerm Web has been configured:

- **Search**

  In the search area, you can search for terms and request new terms. For all users.

- **Request Management**

  In Request management terminologists can manage, edit and finalize their assigned, "All my tasks", and term requests, view and export logged terms, process approval tasks and grant final approval, view edit tasks, translation tasks and feedback. You can also edit the liked entries here.

  End users can edit "Assigned tasks" and "All my tasks" in Request management.

- **Personal Settings**

  Under personal settings, you can set specific options for quickTerm's operation. For all users.

- **Send e-mail**

In this area terminologists can send batch e-mails to any group of recipients.

- **Reporting**

  In this area terminologists can check statistics about the termbase. These include request and task statistics, usage statistics, search results, termbase changes etc.

- **User management**

  In this area administrators can create new users and add users to existing groups.

- **Term Quiz**

  Displays the social component "Term Quiz". The term quiz is accessible to all users, if it is activated by the administrator.

- **Term of the Week**

  Displays the social component "Entry of the week". The entry of the week is accessible to all users, if it is activated by the administrator.

- **Help**

  In the help area, the documentation is available as online help. For all users.

- **FAQ**

  If the administrator has created an FAQ, this can be seen here. It can be defined differently depending on the culture.

- **Login information**

  If configured accordingly by the client administrator, this is in the menu. By clicking on the arrow to the right of the field, the logout button is shown.

- **Language selection**

  If configured accordingly by the client administrator, this is in the menu. By clicking on the arrow to the right of the field, the other GUI languages are shown.

## Search bar

The search bar can be found under the navigation area. In this area you can define what you want to search for. Alternatively, a filter tree can be set up to navigate through the termbase.

You can also define various search options:

- In the text field after "Search", enter what you would like to search for and click on *Search* to the right, or simply press the Enter key. To the right of the Search button you can select the search mode: Normal (=exact), Fuzzy or Full text search:
  - When using normal search mode, the exact character sequence entered will be searched for. You can also use wildcards / asterisks
  - When using fuzzy search mode, similar character sequences will also be found. The search results are sorted by relevance
  - When using full text search mode, all the database fields are searched, not only the term itself.
- Underneath the mode you can determine the *source language*. This is the language in which you want to perform the search.
- You can define which *target languages* should be shown in the entry and in which order. Select the languages you would like to be displayed in the entry (including the search language!).
- You can also select the *search termbases*, if the settings have been configured in such a way that you have the option of searching multiple termbases. The search can also be restricted to individual termbases by checking the relevant box.
- On the far right of this area you can select a *search filter*, if you have been granted the right to do so. This enables you to limit your search to specific areas of the termbase.

All your settings are saved when you log out, therefore you only need to set them once.

## Social Media functions

The administrator has various options to change the way the landing page in quickTerm Web looks. For more information see Configuration/Server Settings/Configuration of quickTerm Web. The options include:

- Selecting the start screen:

  The administrator can select if the start screen in quickTerm Web should be the normal splash screen, the Term of the Week or the Term Quiz.
- Display or hide "liked" and "recommended" entries:

  Liked entries are those that you and your colleagues have liked using the "Like" button. Recommended entries are those that are favored by the terminology team. You will find these in the Search screen.
- "Live chat" functionality:

If this is enabled you will find it at the bottom right of your screen. You can use this function to chat with other users currently logged in.

- Term of the Week

  If your terminology team uses this feature, you will find here particularly interesting entries that they have commented on and linked to the actual entry in the termbase. You can also scroll through previous terms of the week.

- Term Quiz

  If your terminology team supports this feature, you can also participate in terminology quizzes. You can choose from four possible answers to each question. Expand your terminology horizons and join in!

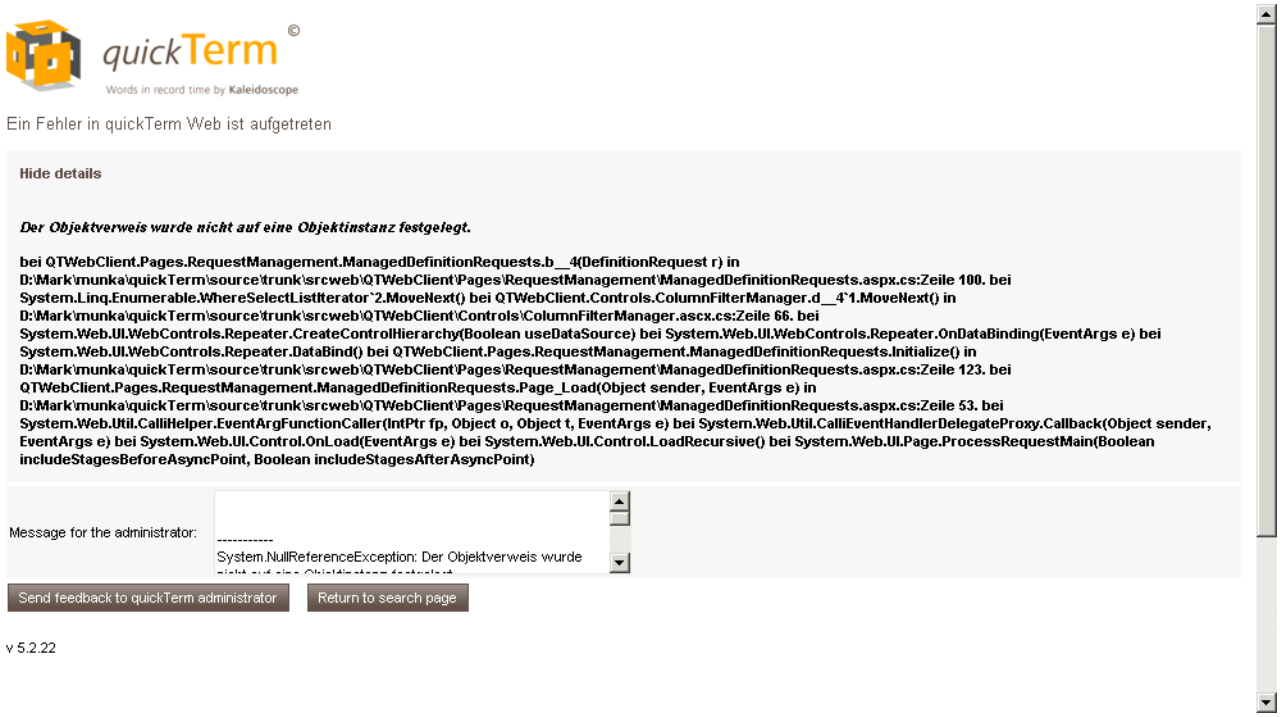
- „Refresh“ button ( )

  When you log in to quickTerm Web as a terminologist, you will see a refresh button beneath the term of the week and term quiz ( ). By clicking on this button, the cache is reloaded to the server. If, as a terminologist, you have made changes to the term of the week and/or term quiz in quickTerm Client, these will appear immediately on the screen after you click Refresh.

## Entry screen

The search results are displayed in a hitlist on the left under the search bar. The selected entry is shown to the right of this. On the far right of the screen you will find other commands that you can perform on the displayed entry.

## Sending error reports


quickTerm
Words in record time by Kaleidoscope
Ein Fehler in quickTerm Web ist aufgetreten
Hide details
Der Objektverweis wurde nicht auf eine Objektinstanz festgelegt.
bei QTWebClient.Pages.RequestManagement.ManagedDefinitionRequests.b__4(DefinitionRequest r) in D:\Mark\munka\quickTerm\source\trunk\srcweb\QTWebClient\Pages\RequestManagement\ManagedDefinitionRequests.aspx.cs:Zeile 100. bei System.Linq.Enumerable.WhereSelectListIterator`2.MoveNext() bei QTWebClient.Controls.ColumnFilterManager.d__4`1.MoveNext() in D:\Mark\munka\quickTerm\source\trunk\srcweb\QTWebClient\Controls\ColumnFilterManager.ascx.cs:Zeile 66. bei System.Web.UI.WebControls.Repeater.CreateControlHierarchy(Boolean useDataSource) bei System.Web.UI.WebControls.Repeater.OnDataBinding(EventArgs e) bei System.Web.UI.WebControls.Repeater.DataBind() bei QTWebClient.Pages.RequestManagement.ManagedDefinitionRequests.Initialize() in D:\Mark\munka\quickTerm\source\trunk\srcweb\QTWebClient\Pages\RequestManagement\ManagedDefinitionRequests.aspx.cs:Zeile 123. bei QTWebClient.Pages.RequestManagement.ManagedDefinitionRequests.Page_Load(Object sender, EventArgs e) in D:\Mark\munka\quickTerm\source\trunk\srcweb\QTWebClient\Pages\RequestManagement\ManagedDefinitionRequests.aspx.cs:Zeile 53. bei System.Web.Util.CalliHelper.EventArgFunctionCaller(IntPtr fp, Object o, Object t, EventArgs e) bei System.Web.Util.CalliEventHandlerDelegateProxy.Callback(Object sender, EventArgs e) bei System.Web.UI.Control.OnLoad(EventArgs e) bei System.Web.UI.Control.LoadRecursive() bei System.Web.UI.Page.ProcessRequestMain(Boolean includeStagesBeforeAsyncPoint, Boolean includeStagesAfterAsyncPoint)
Message for the administrator:
----------
System.NullReferenceException: Der Objektverweis wurde
Send feedback to quickTerm administrator
Return to search page
v 5.2.22

*Error feedback*

If an error occurs in the system, there is the option in quickTerm to notify the administrator by e-mail. To send the text of the error message together with an individual description directly to the administrator, click the "Send feedback to quickTerm administrator" button in the error message dialog.

# 4 Search

## 4.1 Searching for Entries in the Termbase

To search for terminology proceed as follows:

➢ Requirement: You are logged into quickTerm Web. You have specified the appropriate source language and selected the required search mode (if available, Normal, Fuzzy or Full text) and optionally a filter. If you want to filter the search, the filter must be specified BEFORE doing the search.

a) Enter the search term you want in the search field. If you only enter a number, quickTerm will search for the entry with this number.

b) Click on the "Search" button next to the text field.

⇨ quickTerm performs the search and shows the results in the hitlist.

a) Click on the term you want in the hitlist.

⇨ quickTerm shows the entry in the results window.

**Wild cards**

quickTerm supports wildcard search by using an asterisk (*).

### Search Mode: Normal (=exact), fuzzy or full text search

**Search mode**

These options are only available when using a MultiTerm database.

If a normal (exact) search does not return any results, you can perform a fuzzy search. In contrast to a normal search, a fuzzy search finds all terms that are similar but not identical to the highlighted text.

To enable fuzzy searches, select the "Fuzzy" option under "Mode". Once you select "Fuzzy", the checkbox "ABC" will also appear. If you check this box, the fuzzy search results will be sorted alphabetically, rather than in descending order by relevance (%). Exact search results are always sorted alphabetically.

If you search for less than three characters an exact search is performed automatically, otherwise too many similar results will be found.

Full text search: A full text search searches termbases for the specified search text wherever it appears in the entries (not just in the term field).

## Filtered search

If filters have been defined for you, you can restrict the area of the search. For example, to search only within specific subject areas in the termbase.

Filters can be defined for each termbase in the drop-down list, since these may differ depending on the termbase. As a consequence, the format is slightly unusual with multiple radio buttons (one per termbase). If no filter has been selected for one of the termbases, quickTerm will perform an unfiltered search in this termbase. Remember to define filters for all termbases where they are required.

Filters must always be specified BEFORE performing a search.

## The Search results

The search results displayed depend on the contents and structure of your termbase as well as on the selected stylesheet. Please refer to your terminologist for information about the meaning of the fields, contents, colors, hyperlinks, etc.

Depending on the configuration, there is the option to display the contents using multiple stylesheets. In this case, a drop-down box with the available stylesheets is shown at the top of the entry screen. (For more details see the Stylesheets chapter in quickTerm configuration).

Depending on the configuration, there is the option to restrict the content of an entry to specific terms. In this case, a drop-down box with the available term filters is shown at the top of the entry screen. This filter only applies to the display of entries that have already been found, and not to the search itself. (For more details see the Term Filters chapter in quickTerm configuration).

## The Hitlist

The maximum number of terms to be displayed in a search and the maximum number of terms per screen in the hitlist can be defined in the Personal settings depending on the user authorization. If a search returns

more results than can be displayed on a single page, the page number is displayed below the list. This allows you to switch between the results pages using the right (or left) arrow.

The hitlist order is set by the administrator in the server settings under "Search providers" and "Client": Order alphabetically/by relevance, then by termbase OR order by termbase, then alphabetically/by relevance. For further information see Client Management.

This setting also applies for a "fuzzy search": The search results are sorted either by relevance (% match) or alphabetically, if the "ABC" checkbox is selected.

If you have the right to define your own hitlist settings, the hitlist order in the personal settings under search providers may differ from the order configured in the server settings and will then have priority when the results are displayed. For further information see Search Providers.

The fields, information and color codes shown in the hitlist may have already been defined for you by the administrator or you can define these yourself in the personal settings.

## Update entry

You can update the display by clicking on the "Update entry" icon ( ) at the top of the entry screen.

## Sending an Entry as a Link

Provided that the quickTerm base address is defined in the quickTerm configuration and that you have the authorization as a terminologist, you can send the current entry by e-mail to specific user groups.

To do so, in the entry click on the "Send entry link in e-mail" icon ( ) at the top. The "Send e-mail" dialog box opens; you can now highlight the recipient group(s) and enter a subject in the subject line. The link has already been entered in the text automatically. Click on "Send e-mail" to send off the mail.

## Print entry

Any entry can be printed in the appropriate layout using the "Print current entry..." icon ( ) at the top of the entry screen.

The fields, information and color codes shown in the hitlist may have already been defined for you by the administrator or you can define these yourself in the personal settings.

### Copy entry URL to the clipboard

If the user clicks on this icon ( ), the direct link to this entry is shown in a popup. This can then be copied, as it is plain text.

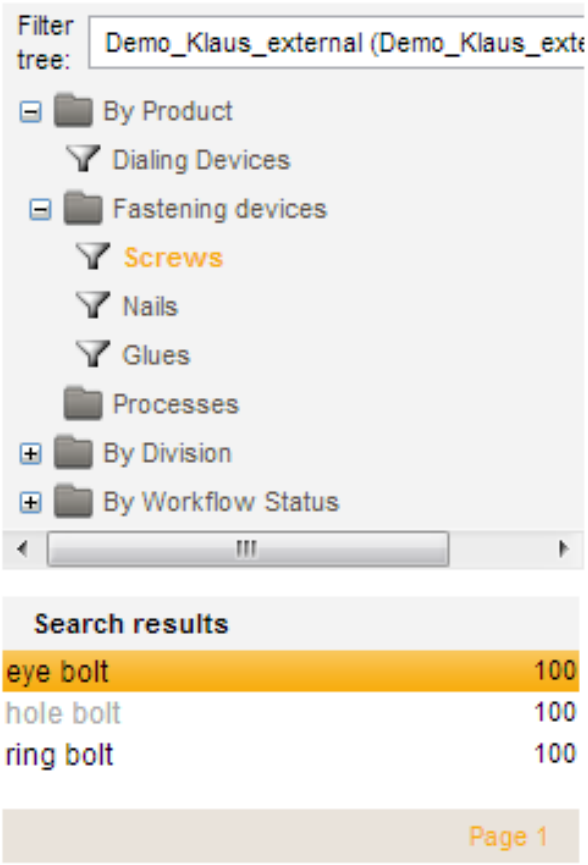
## 4.2 Navigating using the Filter Tree

As an alternative to carrying out a search for a specific term, you can also use the filter tree to navigate in the termbase using pre-defined filter criteria: This feature is only available if a filter tree has been set up for you. Otherwise the button is not visible.

Every branch selected in the filter tree first displays the number of hits. If there is a large number of hits, you can always refine the search within these hits even further in the search field. When you want to return to searching the entire termbase, go back to "Search".

a) Switch to the *Browse filters* view.

⇨ The filter tree is displayed through which you can navigate




*Navigating through the filter tree (Web)*

a) Expand the tree until you can see the desired filter.

b) Click on the filter you require.

⇨ The list of filtered entries is displayed below.

c) Click on the desired entry in the results list.

⇨ The entry is displayed on the right.

# 5 Term of the Week

Depending on your configuration you can display the current "Term of the week" provided by your terminology team. If the administrator has set the Term of the week as the start screen, then it will be displayed immediately after entering the Site.

# 6 Term Quiz

Depending on your configuration you can display the current "term quiz" provided by your terminology team. If the administrator has set the term quiz as the start screen, then it will be displayed immediately after entering the Site.

After clicking on "Start quiz" you will be guided through a set of questions with 4 possible answers each. At the end, you will receive a summary on how you did on the quiz.

# 7 Task Management

What you are able to see and do in this area depends on your role.

## End user

As an end user you can check and edit all tasks currently assigned to you, and also all tasks which you ever had to do with.

## Approver

If you are an approver, the "Approval tasks" tab is also available where you can view more detailed information about approval tasks. You can expand individual tasks to check how your colleagues have voted.

## Terminologist

Terminologists are also able to do the following:

- Manage and confirm received term requests (mono or multilingual) and create the terms in the termbase.
- Track the approval process and perform final approvals.
- Manage edit tasks.
- Manage translation tasks.
- Manage feedback on terms.
- Export logged terms for statistical processing or create term requests from logged terms.
- Manage quickTerm Web´s "social" functions (only via the desktop client):
  - Delete liked entries
  - Revoke recommended entries
  - Term of the Week
  - Term Quiz

## Sorting and filtering lists

The list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by selecting one or more options from a pre-defined list.

If you want to select more than one row in the task list, you can do this using the standard Windows functions: select a number of rows using the Shift or Control key, or all rows using "Ctrl A". Used in combination with the filter function, this makes it easy to edit the task list. For example, you can delete the selected rows using the Delete key.

**Deleting rows**

Individual rows will be deleted without prompting you to confirm that this is really what you want to do!

## "Read" and "unread" tasks

In all task lists, the buttons "Mark as read" and "Mark as unread" are available. Depending on the current task, one of these is always greyed out. Unread tasks are always displayed in bold, like in Outlook. By clicking the respective button, you can change the state.

A task is automatically changed to "read" when you select it in the list. With the "Hide read tasks" option you can hide the read tasks and only display the unread ones.

# 8 Feedback to Terminologists

If the search is not successful there are a number of options, depending on the user authorization, for communicating this to the internal terminology team. Depending on the configuration in your company, some of these functions may not be available:

## Term request

By clicking on the "Request new term" button you can send the requested term straight to the terminology team and start a workflow. If this has been configured in Task Settings, the terminologist will receive an e-mail and your request will go to the terminologist's request management screen for actioning.

Depending on the setup of the internal workflow, you will get prompt feedback about the term you need and you can incorporate it into your application and/or correct the term straightaway. For more information see The quickTerm Workflows.

## Request an alternative term

This button is only available to you if the administrator has enabled it in Group management. In this case, you can request that an alternative entry is added to an existing one. The workflow is identical to that of term requests, however reference is made to a specific entry. The alternative term can therefore only be merged with an existing entry by the terminologist; it is NOT possible to save the alternative term as a new entry.

## Logging Terms

quickTerm logs all unsuccessful searches. However, since there is also the possibility of a search being unsuccessful due to an error, you have the option to log the required term separately in a central search log by clicking on the "Log term" button. The terminology team will then work through these terms at regular intervals and, if necessary, add new terms to the database. In contrast to term requests, the log term feature does not start a workflow!

## Feedback

By clicking on the "Send feedback" button you can send the terminology team feedback on a specific entry.

### Change request

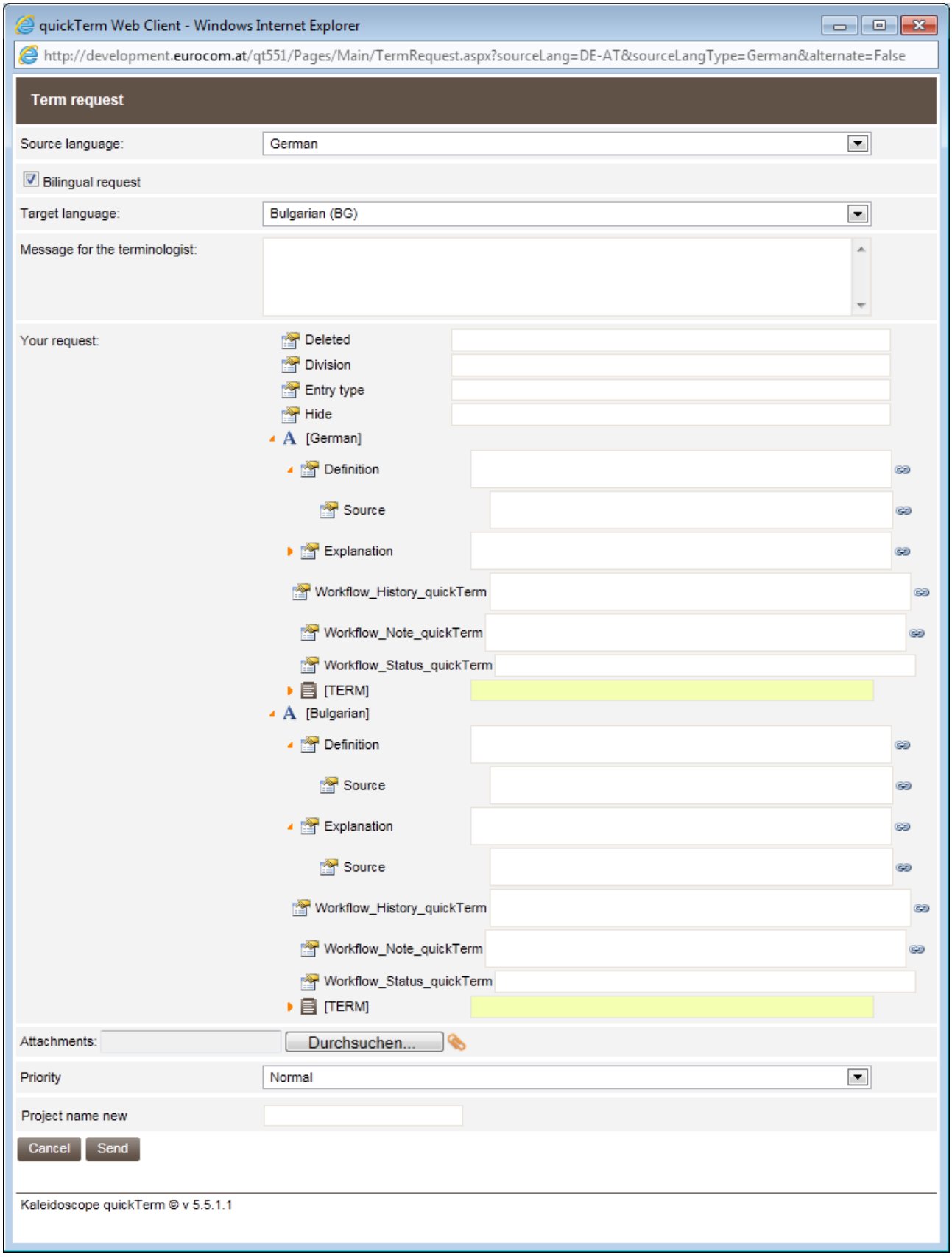
By clicking on the "Request change" button you can request changes to specific fields for the term. The terminologist will then review the suggested changes, and either apply them to the termbase, refer them to a specialist team, or reject them.

### Translation request

By clicking on the "Request translation" button, you can request the translation of a term in a specific language and also submit a translation suggestion if you wish. The terminologist will then review the suggested changes, and either apply them to the termbase, refer them to a specialist team, or reject them.

## 8.1 Term request

The "Term request" dialog box may look different for different users, since the administrator can specify which information the individual users may or must enter. If you are adding a large amount of information for a term request and you want to expand the dialog box to get a clearer view, you can do this using the mouse pointer in the bottom right corner.




*"Term request" dialog*

To request a term, proceed as follows:

a) Click on "Request a term".

⇨ The "Request a term" dialog opens.

b) If you have several termbases available, select the termbase for which the request is being made.

c) Select the desired source language.

d) If you are authorized to make multilingual term requests, you can switch to a bilingual term request by checking the Bilingual request box. In this case, you have the option to specify a source and target language.

e) "Comment"
This field lets you add a comment to your term request. This is not stored in the termbase but provides the terminologist with additional information when processing the request.

f) If the term request is in response to an unsuccessful search, the term is automatically entered here. However, this will only work if the search screen and term request source languages are identical.

g) Enter the required information in the available fields under "Your request". Ask you terminologist about the meaning of the available fields. Some fields are text fields, meaning you can enter any text.
However, other fields provide a drop-down list, because there are only a limited number of possible values. Depending on the configuration, the values can also appear in a tree structure, allowing you to collapse and expand branches and select any sub-node in the tree.
Other fields may appear with a hyperlink icon , which means you can save links here. The hyperlink icons – as well as the Add new term and Remove term buttons – can be enabled or disabled by the client administrator for each user group using the Enable advanced editor features setting. When you click on the hyperlink icon, a separate screen "Edit cross-links" opens. In this screen you can insert the text for three types of hyperlinks: to another term, to another entry, and to an external object (with http://...).
Mandatory fields are highlighted in yellow, and read-only fields are highlighted in gray.
Finally, if you are working with Acrolinx as the terminology type, you have the option of saving images and attachments not only in quickTerm, but also in Acrolinx. This is only possible for fields defined as "Multimedia". Click on the "Browse" icon next to a field of this type and select a PDF document. This is then shown as an attachment next to a

disk icon at the bottom and can only be removed from the relevant field, if required, using the delete icon. An example of this is shown in the above "Term request dialog box" screenshot.

h) Name, E-mail and Custom notification phone:
These three fields help to identify anonymous end users so they can be sent notifications (by e-mail or telephone). They can be defined as mandatory fields in the General Group Settings for end users. If the user enters an e-mail address here, then quickTerm can notify this user via e-mail about what happens to the term request.

i) Auto-fill:
A *Customization field* can be defined in server management in the Termbase Settings. Check this box if you want this field to be autofilled in the term request; otherwise you can add this information manually. These details can be obtained from your terminologist.

j) Creator user:
Depending on how your internal processes are defined, you have the option to enter your name here so that the terminologist will know who the term request came from, and so that you can continue to use the MultiTerm entry as "Creator". This can also be disabled in Administration.

k) Priority
You can assign three different priority levels to your request: "low" - "normal" - "high". These symbols are shown in the term request lists in the left-hand column. The priority is linked to internal processes and can also be linked to e-mail notifications.

l) Click on the orange paper clip to attach a file to the term request.

⇨ The file is added. To attach further files click on the paper clip again. To remove files that have been added, click on the "x" symbol that appears in front of each file.

a) Click on "Send".

⇨ The terminologist receives an email and can process the request in his/her request management. When the terminologist closes the request, you are notified by e-mail with an explanation of what happened to your request.

**Changing the source or target language**

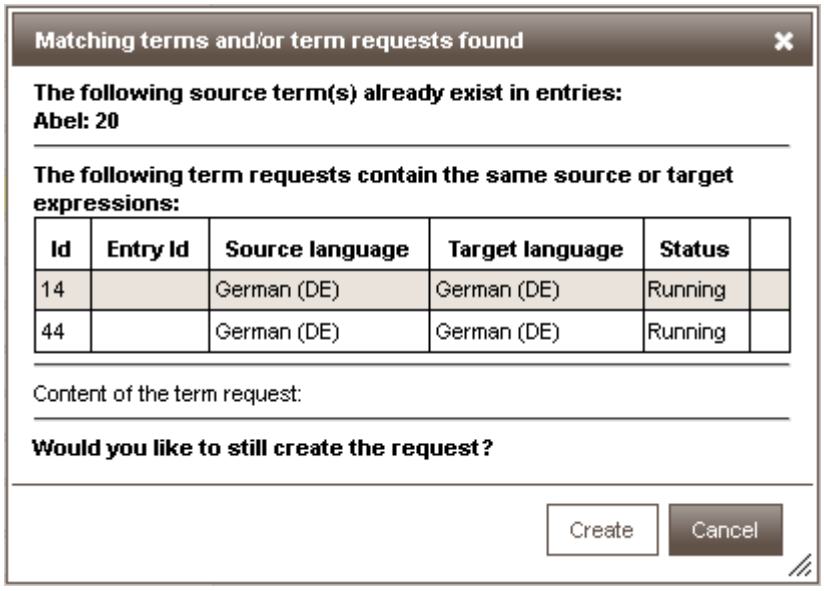
If you change the language of the request but have already entered data, then quickTerm will ask whether you want to keep the data you have entered so far and use it for the new language.

### Multiple requests warning

When a new term request is submitted, quickTerm checks whether this term request:

- Already exists as an entry in the termbase
- Already exists as a currently pending term request
- Already exists as a rejected term request

This information is passed to the user, who can then still create the request, if he wants.




*"Matching terms and/or term requests found" dialog*

## 8.1.1 Editing your own Term Requests

If you have been granted the right to do so, you can edit or even delete your own term requests after filing them.

To do this, proceed as follows:

a) Click on the *Request management* button. If you cannot see this button, then you do not have the right to access your term requests after filing them.

⇨ You will get the list of tasks currently assigned to you.

b) Click on *All my tasks*.

c) Then click on the term request you want to edit. Note that you can also filter the term requests displayed.

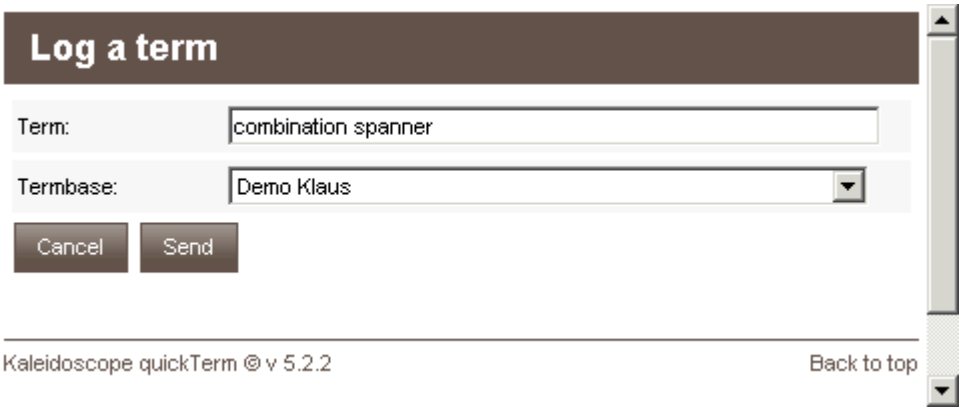
d) Click on *Delete* in order to withdraw the request. This is only possible if the term request has not yet been processed by the terminologist.

e) Click on *Open* to view and edit the content of the term request in the entry editor.

f) Click on *Save changes* in order to save the edited term request.

## 8.2 Logging Terms

This is how you log and centrally store a term without initiating immediate term processing:




*"Log term" dialog*

a) Click on the *Log term* button.

⇨ A window opens in which the term not found has already been entered.

a) If several termbases are available, you can select the termbase for which you want to log the term.

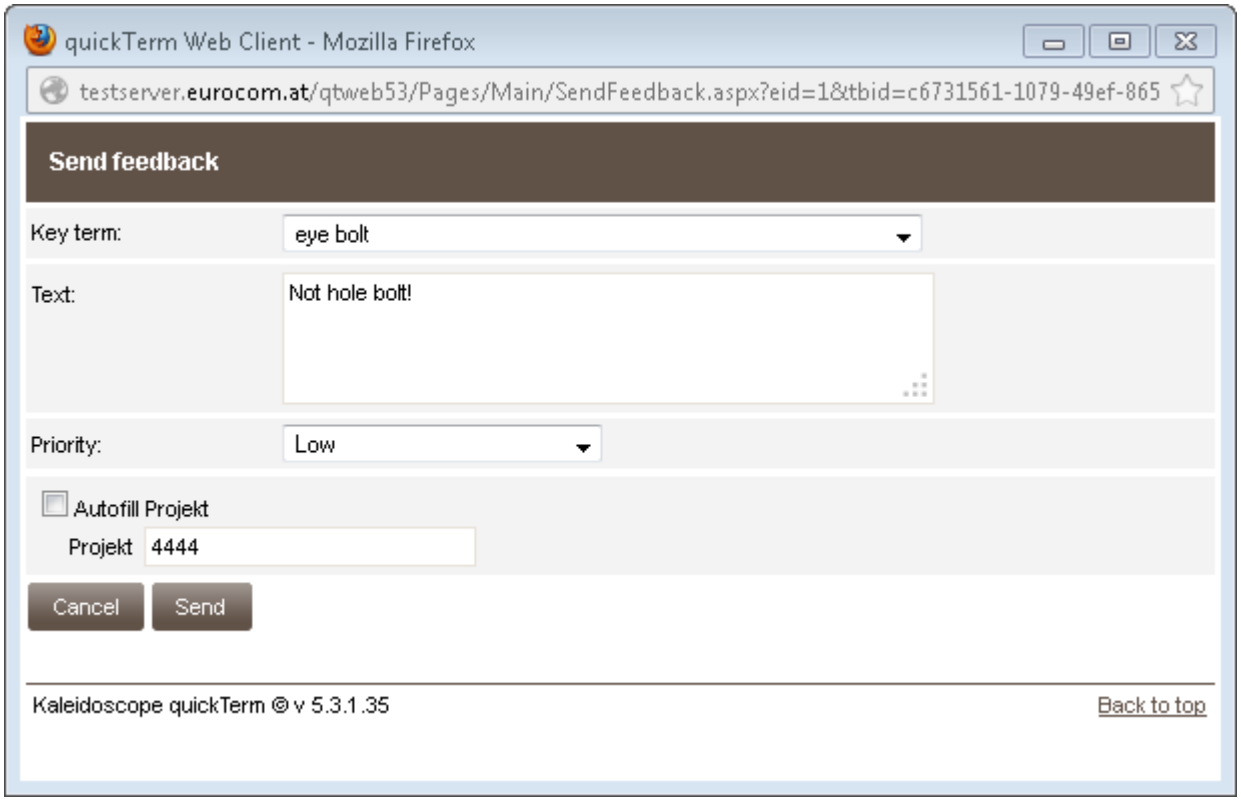
b) Click *Send*.

⇨ Your term will now be stored in the server's central log. Depending on the definition of the terminology workflow, the terminology team will regularly review this pool to look for potential new terms.

For automatic logging, see Term Request [→ 55].

## 8.3 Sending Feedback about a Term

If you are authorized to do so, you can also provide direct feedback to the terminologist.




*"Send feedback" dialog*

➢ The desired entry is displayed in quickTerm.

a) Click on "Send feedback".

⇨ The "Send feedback" dialog opens.

b) Select the term in the entry for which you want to provide feedback and/or a title for your feedback.

c) Select one of the three priority levels.

d) If a customization field has been defined, you have the option of entering further information in this field. In the current example this is the "Project number" field.

e) If you are an anonymous end user, there is the option of entering your details in the three custom notification fields ("Name", "E-mail", "Telephone number").

f) Enter the text of your feedback.

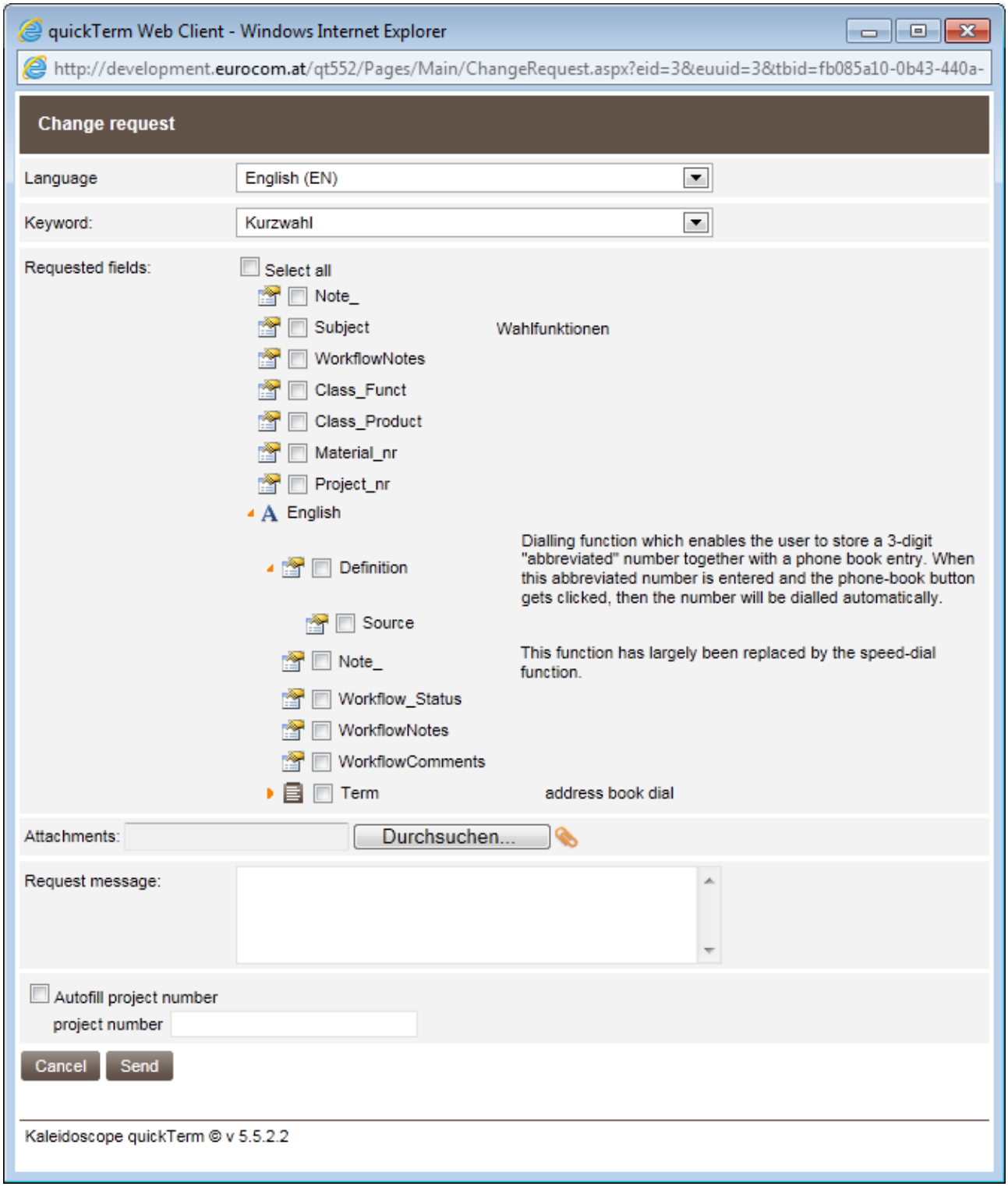
g) Click on "Send".

⇨ Your feedback will be sent to the terminology team who will then check it. quickTerm does not provide confirmation of receipt of terminology feedback.

A chat feature ("Ask for information" and "Answer info request") is available within Request management. This feature is described there.

## 8.4 Change Request

By clicking on the "Request change" button you can request changes to specific fields for the term.




*"Change request" dialog*

a) "Target language"
   Select the Target language in which you want to request a change.

b) "Title"
   Select which term of this entry should be used as a title for this request.

c) In the tree structure select the fields that need to be completed for this change request.

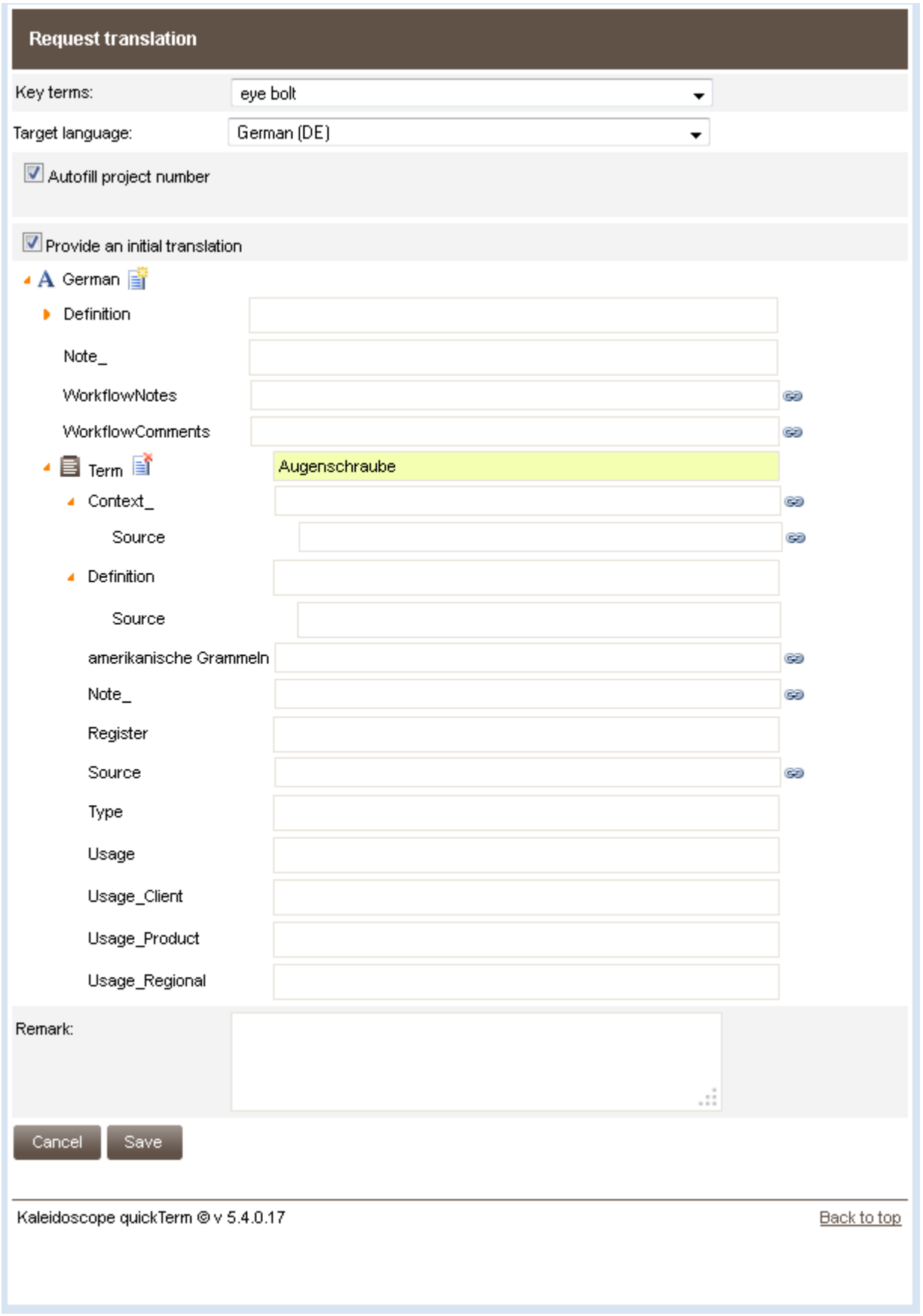
d) "Message"
   You have the option of entering a message for the terminologist here.

e) Specify whether the custom field should be autofilled, or enter the corresponding value ("Project number" in the screenshot). This option is only available if the custom field is set up to be linked to a termbase field.

f) Then click on "Send".

   ⇨ The change request is created. The terminologist will action the request.

# 8.5 Translation Request




*"Request translation" dialog*

By clicking on the "Request translation" button, you can request the translation of a term in a specific language and also submit a translation suggestion if you wish.

a) Select a title for your translation request by choosing one of the existing terms.

b) Select the Target language into which it is to be translated.
Depending on your group configuration, you can only file a translation request in a language which is not yet contained in the entry, or you can file alternative translation requests, even though the entry already has a term in that language (see Configuration - General Group Settings).

c) If you want to submit a "translation suggestion" along with your request, then select the corresponding checkbox. This will expand the entry tree, showing you the fields you have access to. You can fill in the appropriate fields for your suggestion.

d) You can also enter your own "Comment".

e) Then click on "Save".

⇨ The translation request is created. The terminologist will action the request.

# 9 Initial Checker: Special Functions

The initial checker has the right to check submitted requests (term suggestions, as well as edit and translation tasks), which may also be filtered, from a linguistic point of view before they are assigned to the (main) terminologists responsible (sometimes this role is also referred to as "linguist"). He checks the completed fields for errors (spelling, syntax, correct use of hyphens, etc.). All term suggestions are therefore first added to the initial checker's task list, provided a checker has been configured. He therefore cannot add entries to a termbase, but only forward them on to the (main) terminologist instead.

The initial checker can perform one of the following actions:

- "Open"

  Clicking on this button opens the term request. The initial checker can now edit it, merge it with another term request, or send it on to the (main) terminologist.

- "Send to terminologist"

  Clicking on this button will forward the term request to the responsible (main) terminologist.

- "Reject"

  Clicking on this button rejects the term request.

- "Delete"

  Clicking on this button deletes the term request altogether.

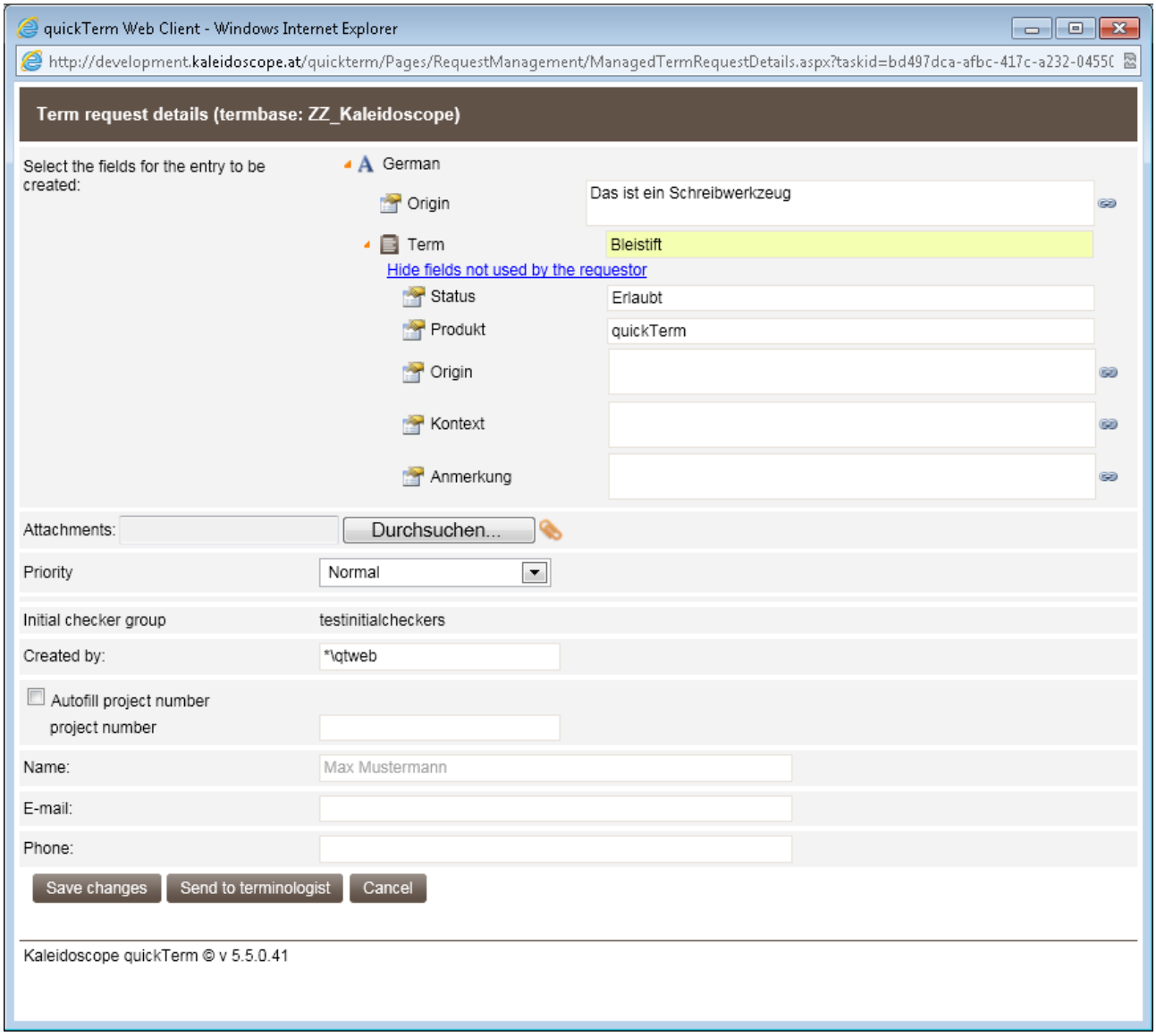
## "Read" and "unread" tasks

In all task lists, the buttons "Mark as read" and "Mark as unread" are available. Depending on the current task, one of these is always greyed out. Unread tasks are always displayed in bold, like in Outlook. By clicking the respective button, you can change the state.

A task is automatically changed to "read" when you select it in the list. With the "Hide read tasks" option you can hide the read tasks and only display the unread ones.

**Initial checker not configured**

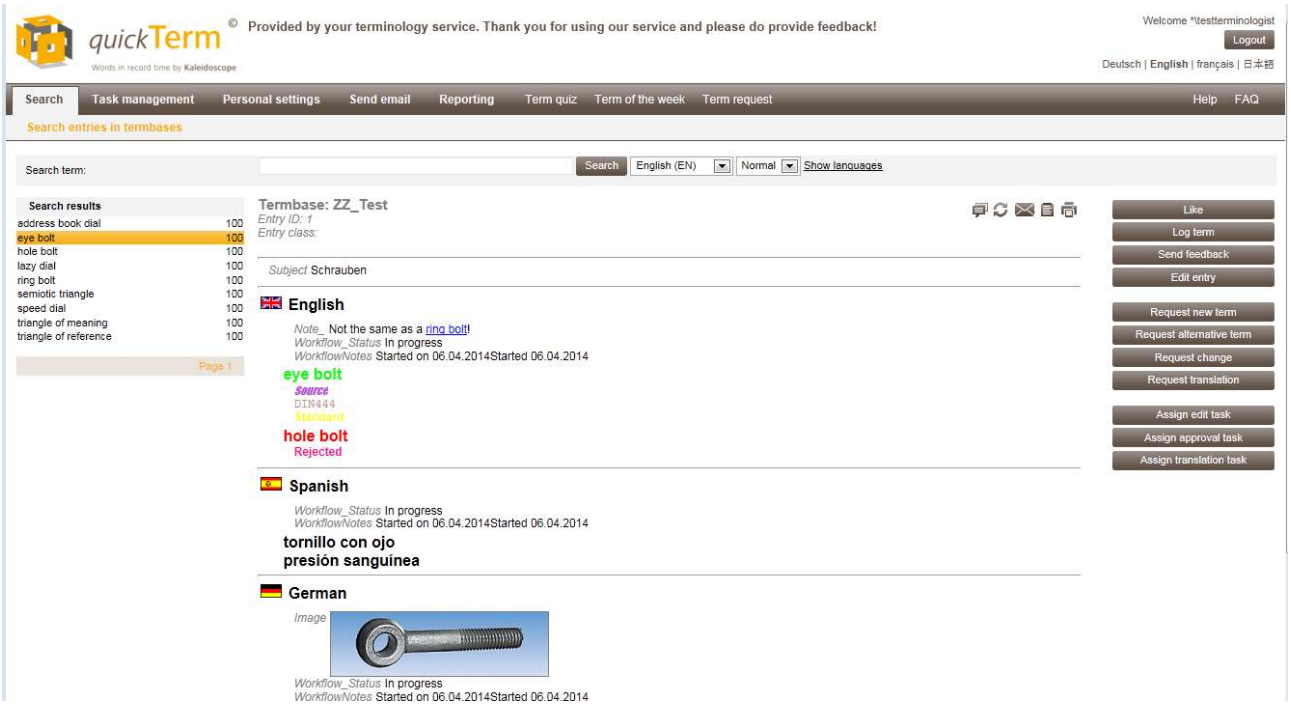
If an initial checker has not been configured, the request is sent straight to the (main) terminologist responsible.




*"Term request details" dialog*

# 10 Terminologist: Special Functions

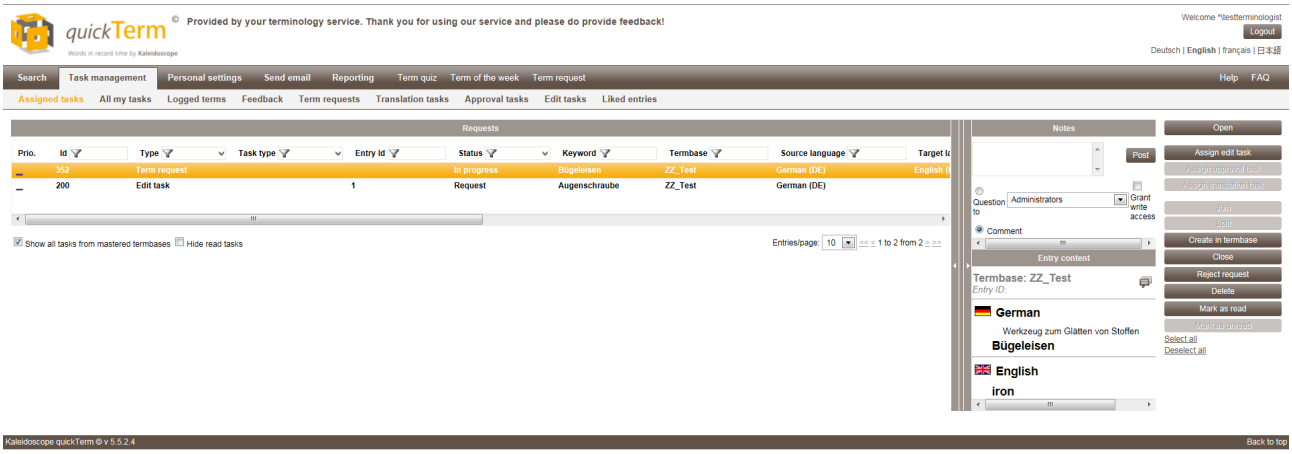
As the central authority for the terminology workflow, the terminologist has some additional functions. For this reason, the quickTerm search window contains some extra buttons.




*Main window for the terminologist in quickTerm Web*

## 10.1 Workflow for Term Requests

Switch to the Request management screen. In Assigned tasks you can filter by term request, or you can go straight to the Term requests tab. In this list you can see the currently pending term requests.




*Overview of term requests*

**Buttons and functions**

The buttons and functions available depend on the options chosen during configuration and can differ from those shown in this screenshot.

The columns are more or less self-explanatory. The administrator can customize the order of the columns for each user group on the "UI setup" tab. The custom field is also used for this purpose. ID is the consecutive number of the quickTerm term request, the Entry ID is the number in the termbase, assuming the entry already exists in the termbase. This can also be seen from the red checkmark.

Terminologist (creating) is the user who transferred the term request to the termbase. Terminologist (closing) is the user who gave final approval in the context of the approval process.

## Possible statuses for term requests and what they mean

- "In progress"

  The request has been assigned to the terminologist and a decision is pending.

- "Defining"

  The terminologist has assigned the request to a specialist for actioning.

- "Created"

  The request has been created in the termbase, but is not yet closed.

- "Exported"

  The request has been exported (and transferred to another system).

- "Closed"

  The request has been closed.

- "Initial checking"

  The request is at the initial checking stage (before allocation to the terminologist).

- "Transferring"

  The terminologist has allocated the request to another (main) terminologist, who has not yet accepted the request.

- "Rejected"

  The terminologist or initial checker has refused the request.

Terminologist (closing) is the user who gave final approval in the context of the approval process.

### 10.1.1 Rejecting a Term Request

To reject a submitted term request proceed as follows:

a) Highlight the relevant term request/s in the list.

b) Click on "Reject".

⇨ A comments area will open.

c) You have the option of entering a message for the requestor here. This is sent by e-mail to the requestor and added to the term request as a note.

d) If you are using Acrolinx as the terminology type, an additional checkbox with the text "Export terms as non-term" is displayed under the message field. If you check this box, this term is exported to Acrolinx as a non-term. In contrast to the MultiTerm workflow, in which rejected terms are only saved in quickTerm, with Acrolinx rejected term requests can be (do not have to be!) saved as non-terms in Acrolinx. This should prevent rejected terms being extracted again as potential new terms at the checking stage. This decision must be made for each individual rejection of a term request.

e) Click on "OK".

⇨ The request is now rejected and the requestor informed.

### 10.1.2 Creating a Term Request in the Termbase

To add a submitted term request to the termbase proceed as follows:

a) Highlight the relevant term request in the list.

b) Click "Create in termbase" to add the term request to the termbase immediately, or click "Open" to check the term request.

⇨ The term request is shown together with the information entered by the requestor.

c) In the fields list deselect those fields you do not want to add to the termbase.

d) Edit the contents of the completed fields as required.

e) Click "Show not used fields" to show all fields you have access to in the termbase.

⇨ You will now see all fields in the dialog box that you have access to in quickTerm. You can now enter further information here. When adding further information, the box to the left of the relevant field is checked, so that it is taken into consideration when saving.

f) You can also hide these "not used fields" at any time ("Hide fields not used by the requestor").

g) For example, you can expand synonyms for a term request using the "Add new term" button next to the language, or remove terms using the "Remove term" button next to the term.

h) Specify the priority of the term request.

i) "Initial checker group"
This field shows you which initial checker group the term request has been assigned to.

j) "Created by:"
You can replace the original requestor with your user name here.

k) Select the entry class for the termbase (if you use entry classes).

l) "Assigned terminologist group":
If you use more than one terminology groups and a main terminologist group, then you can delegate the term request to another terminologist group.
In Group management, the administrator can use the "Specialization settings" for "Subject area" (values for the filtering field, managed languages) to permanently delegate or assign requests to other terminologist groups. This creates an automatic link in the term request between the terminologist group and subject area. If you change the terminologist group, then this will also change the related field value in the termbase entry. If there is no single value associated with the new terminologist group, then you can choose the value in a popup. If you change the value of the filtering field, the terminologist group responsible will be automatically be changed. The term request is then given the status "Transferring" until the terminologist responsible accepts the term request, whereupon the status reverts to "In progress" again. If e-mail notification is active, the terminologists receive a message about this state change, too.

m) "Custom field:"
Here you can enter a relevant value.

n) Check that attachments were also sent. These cannot be created directly in the termbase from quickTerm. However, the attachments can be downloaded and then uploaded manually to the termbase.

o) Click "Create in termbase".

⇨ The entry is created in the termbase and the entry ID is displayed.

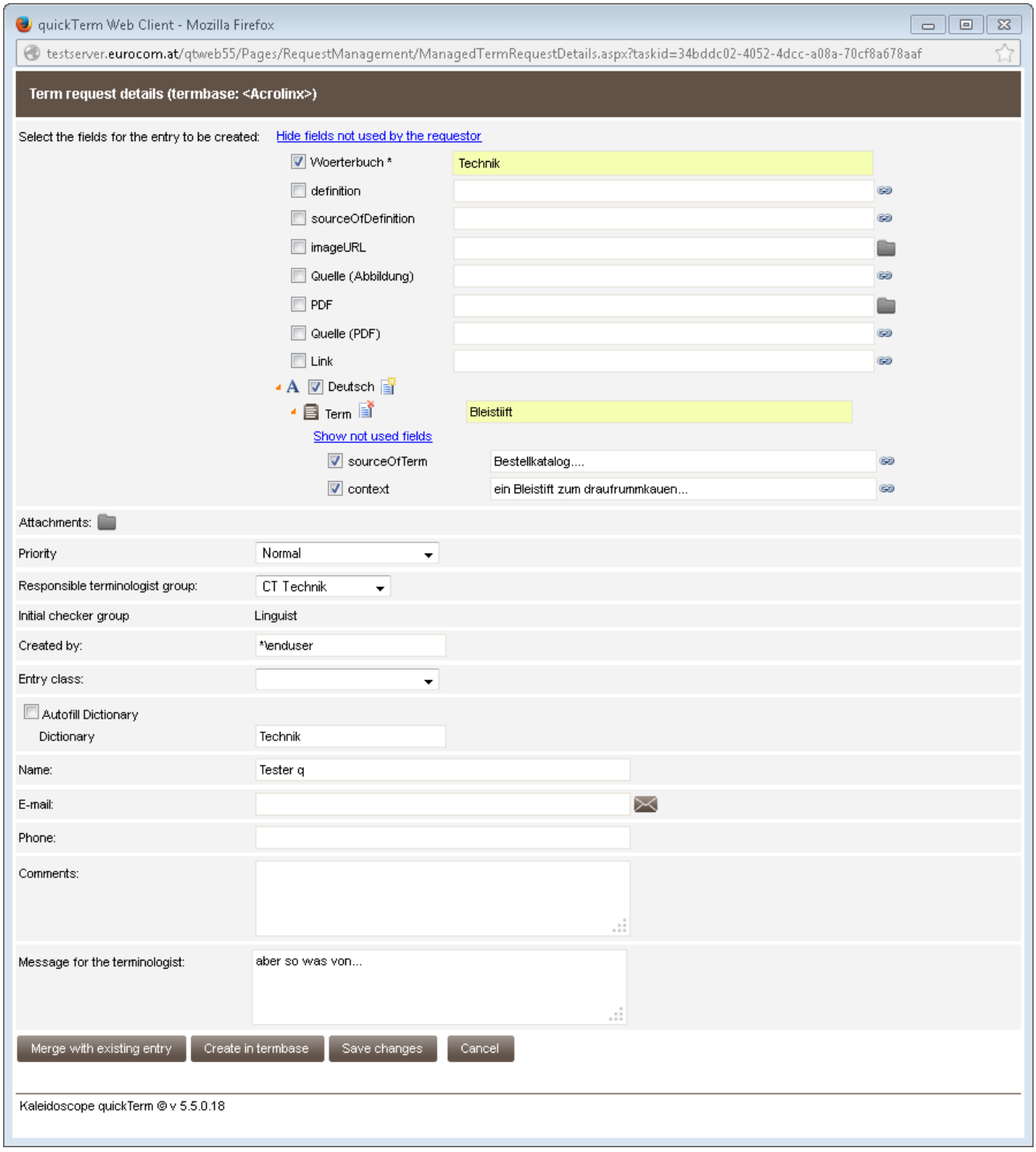
⇨ The entry ID for this entry is now shown in the list of term requests next to a red checkmark.

**Contact Info for Anonymous Requests from quickTerm Web**

If the term request originates from an anonymous user in quickTerm Web, the user may also have included their contact information. This information is shown in the center below the term request itself, giving you the option to contact the requestor if you wish.

**Term request details: Unchecking checkboxes**

If you uncheck checkboxes in a term request, then not only is the checkmark removed, this also affects the corresponding content!




*"Term request" dialog*

## Merging with an Existing Termbase Entry

If you want to merge the term request with an existing entry, click on "Merge with existing entry". This will open a window where you can log the target entry ID and perform a search. This target entry – if available – is then shown at the bottom of the window.

You can now define what should happen with any fields that are already available (at entry and language level) in the target entry:

- "Overwrite existing"

  Overwrites existing fields in the termbase with the contents of the term request. Non-multiple picklist fields (this means that only one value in the list can be selected) are always overwritten, i.e., the new field value always "wins".

- "Keep existing"

  Retains the existing fields in the termbase. The fields in the term request that are already available are rejected.

- "Merge with existing"

  For picklist fields the sum of all values is written to the field. For text fields both sets of contents are written to their own field (i.e., two fields are created).

You can also use the "Add new fields" checkbox to specify whether additional fields (i.e., fields that exist in the term request, but do not yet exist in the termbase entry) should or should not be added. For non-multiple text fields, the text is always attached to the original contents separated by a semicolon.

When you click on "Merge" the option you selected is implemented.

### Saving an entry

If you have finished editing an entry, but do not yet want to create it in the termbase, simply click on "Save changes". This saves the changes to the term request without creating an entry in the termbase.

## 10.1.3 Merging Multiple Term Requests

Sometimes several users send term requests that need to be merged in a single entry. This is often the case where there are several translators working in different languages.

If at least one term is identical in multiple requests, quickTerm will automatically merge these in a single entry anyway.

To merge several entries manually, proceed as follows:

a) Highlight the relevant entries. You can select several entries at once by holding down the Ctrl key.

b) Click *Join*.

⇨ The entries are now merged. This can be seen in the list by the fact that the entries are highlighted in color, and that they are indented. The indented entries are the subtask which belong to the main tasks (two different task types in the *Assigned tasks* and *All my tasks* lists).

To split entries that have been merged by mistake, proceed as follows:

a) Highlight the indented entries.

b) Click *Split*.

⇨ The selected entry is separated from the group and reinstated.

## 10.1.4 Permanently Assigning Term Requests

The permanent delegation is carried out as follows from the perspective of the terminologist receiving the request:

The term request that was assigned appears in the "Assigned tasks" tab with the status "Transferring".

When the term request is opened, it is displayed as usual. However, a popup window appears over it with the text: The following request(s) are being permanently assigned to you `(number of the task)`. Do you accept them?"

- "Yes"

  You can now edit the term request details as usual.

- "No"

  Give a reason for your rejection in the text field.

- "Cancel"

  You do not want to make a decision about accepting the term request just yet.

## 10.1.5 Other Features in the Term Requests Dialog Box

- "Assign edit task"

  When you click on *Assign edit task*, a dialog box opens in which you can define requested fields from specialists and choose which specialist group to assign the task to. You can also specify here whether or not the custom field should be autofilled, set a deadline and the priority, and include a message. For further information see Research.

- "Assign approval task"

  If the request was created in the termbase, you can go straight to the "Assign approval task" dialog box and complete the required entries there.

- "Assign translation task"

  If you require a translation, click this button to open the "Assign a translation task" dialog box in which you can select the relevant languages, translator and, if applicable, the master translator, as well as a deadline and priority. You can also specify whether or not the custom field should be autofilled and add a remark.

- By clicking on *Export*, you can export the requested entries in CSV format, e.g. for MS Excel.
- By clicking on *Delete*, you can permanently delete a term request from the list of open and closed term requests. You can only edit or delete your own term requests if the administrator has enabled this for you in User management.
- The *Hide already closed tasks* checkbox allows you to specify whether to display only open tasks or all tasks, including the closed ones.
- The *Show all tasks from mastered termbases* checkbox allows you as the master terminologist to specify whether you want to see the tasks of all terminologists for your client, or only your own tasks.

**Delete closed requests**

Closed requests are not deleted from the list, they are just hidden. One of the benefits of this is that you can retrieve reports on term requests and how they have been processed from the database at a later time.

Moreover, quickTerm can only check new requests against requests that are already available if these still exist in the database.

You can also only physically remove closed requests from the list using *Delete*.

### 10.1.6 Workflow for Specialists

There is the option to send a term request to a specialist as an edit task, and to apply the changes that result from this process at a later time. For more information check the Workflow chapter.

### 10.1.7 Closing Term Requests

To close a submitted term request proceed as follows:

a) Highlight the relevant term request/s in the list.

b) Click on "Close".

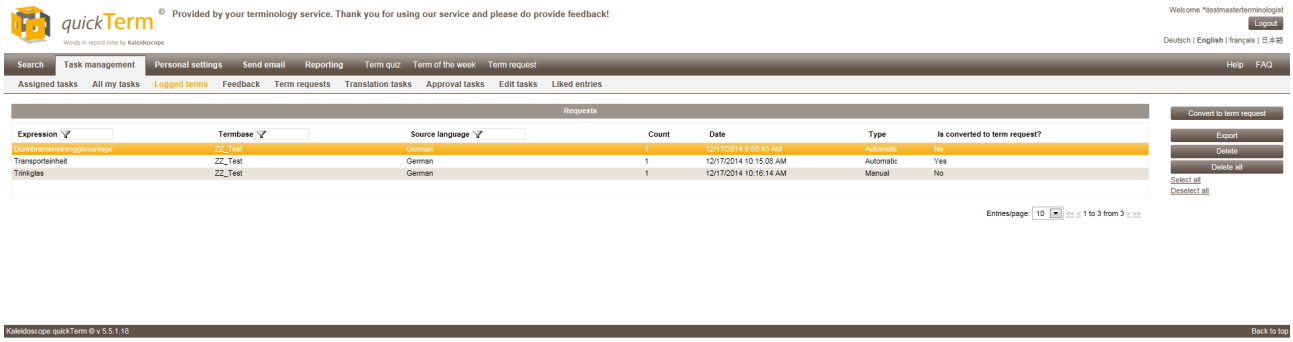
⇨ A comments area will open.

c) You have the option of entering a message for the requestor here. This is sent by e-mail to the requestor and added to the term request as a note.

d) Click on "OK".

⇨ The request is now closed and the requestor informed.

## 10.2 Workflow for Logged Terms




*Overview of logged terms in quick Term Web*

In this screen, you can find the list of logged terms.

Two attributes are available in the "Type" column:

- "Manual"

  If logging has been requested manually

- "Automatic"

  After an unsuccessful search, in accordance with the setting configured for this

Depending on the server settings, identical search requests are added together (i.e., the number is logged), or alternatively the date of each individual search request is shown (for more details see Termbase Settings chapter in quickTerm configuration).

You can export this list in CVS format by clicking on "Export". The list can then be opened in Excel for further processing, etc. Once this is done, clicking on "Delete all" clears the list again. Individual logged search requests can also be deleted by clicking on "Delete". The list can also be sorted by clicking on the relevant column header (e.g., frequency of the request).

### Convert to term request

Highlight the logged term for which you want to create a term request. (You can also do this for several logged terms at once, however they must relate to the same termbase and source language). The term request window that has been autofilled with the term entry will then open. Normally, this is only useful for terms for which a term request has not yet been created. Note that as the administrator you can define a threshold such that a term request is created completely automatically after a specified number of unsuccessful searches (see Task Settings).

## 10.3 Workflow for Approvals

As the terminologist you can send an entry that you have completed work on to pre-configured approver groups for approval. This will result in either approval or rejection. If the approver agrees with your suggestion, you can issue final approval for the entry in the termbase. If the approver rejects the entry, you can edit it in the termbase or in quickTerm using the change workflow, and resubmit it for approval.

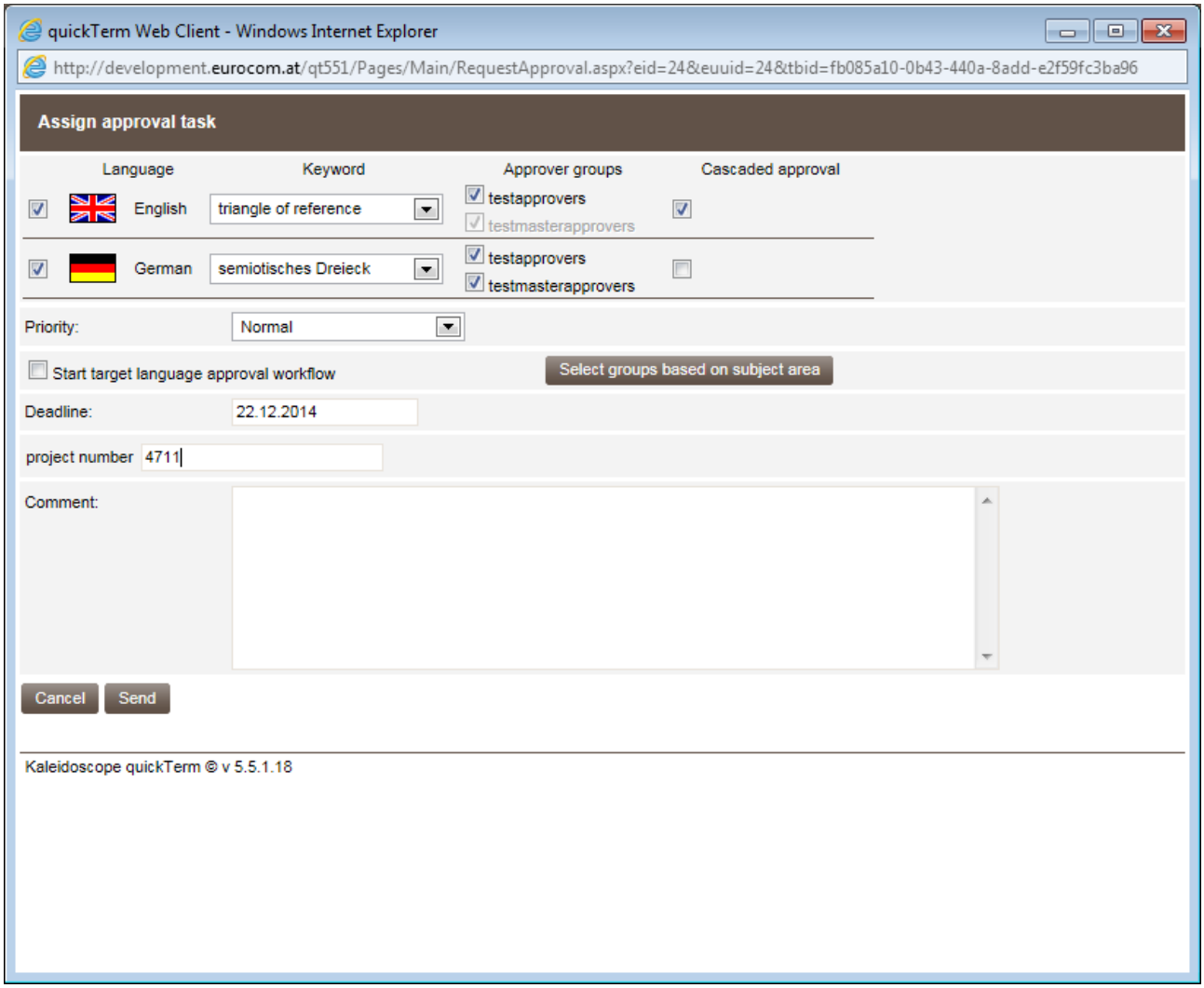
In the context of approval, terminologists are responsible for the following activities:

- Submitting entries for approval (approval tasks )
- Managing and monitoring the approval process
- Issuing final approval for approved entries

### 10.3.1 Assigning Approval Tasks

You can send a new or not yet approved term for approval from the search window itself, in other words assign an approval task. You can also resubmit an approved entry for approval if it has been changed.

Further information about the quickTerm workflows can be found under quickTerm Workflows.




*"Assign approval task" dialog*

To assign an approval task:

a) Search in quickTerm for the entry you want to have approved.

b) Click on "Assign approval task".

⇨ The "Assign approval task" dialog box appears.

c) Select the languages in which approval is to take place and the relevant keywords to be used as the *keyword* for the approval task for each language.

d) Select the *groups* that need to give *approval*. The available groups have been defined by the administrator for each language. For cascaded approvals the main approver cannot be deselected, since the main approver has to have the final say.

⇨ The approvers are sent an e-mail and can log in to process the approval in their request management.

⇨ Groups that have subscribed to receive notification of the start of an approval process in one of the selected languages will be notified.

⇨ quickTerm sets the status "In progress" in the termbase.

a) *Cascaded approval* checkbox: Every approval process is a cascaded process by default. This means that initially all "normal" approvers are involved and then the main approver for each language signs off final approval by the terminologist. You can uncheck the *Cascaded approval* box. In this case, the main approver is viewed as a "normal" approver and all groups can vote on an entry at the same time. This checkbox is available for each language and can be selected or deselected as required.

b) *Start target language approval workflow* checkbox: Check this option if you are submitting an entry to the approval process in a target language and as the terminologist do not wish to be the final approver, but instead you want to use the target language final approver.

c) *Select groups based on subject area* button: For further details see *Automatic assignment based on entry information* in Configuration of Approvers and Master Approvers. When you click on this button, assignment of approver groups takes place automatically.
For example: If you have an entry with the subject area = screws and two approver groups, one for the subject area = screws and one for the subject area = telephones, clicking on this button means only the FIRST group will be assigned the task.
If there is a third approver group WITHOUT explicit filtering, this group will ALWAYS be assigned the task irrespective of which subject area appears in the termbase.

d) *Priority*: You can choose between *Low*, *Normal* and *High*. This will have an effect on when digest e-mails are sent, if these have been configured differently.

e) *Deadline*: Select a deadline. If this deadline is passed, the approval task is highlighted in red in the list.

f) *Autofill*: You can set the content of the custom field to be autofilled by checking this box or enter the information manually here. Using the screenshot as an example: Project. Please check how this has been configured with your terminologist.

g) *Comment*: You can enter a comment here that will then appear as the first comment in the comments list.

**Check for Already Approved Entries**

When an approval is initiated, quickTerm checks whether the entry has already been approved in this or another language. In this case a change to an already standardized entry is involved.

This check avoids a situation where the approval for an already approved entry is "revoked" by the workflow being restarted. It also helps to prevent a change being made in only one language without the other languages being checked again.

The terminologist can decide whether or not to submit the language for approval again (in other words, revoke the approval).

This check is done both in the quickTerm workflow database as well as the approval fields of the termbase (if any).

**Check for Approval in Progress**

Whenever an approval is initiated quickTerm checks whether an approval process is in progress for the selected entry. In this case the language cannot be submitted for approval again, although of course it is perfectly feasible to do this for all the other languages. A prompt is shown detailing the language(s) that cannot be resubmitted for approval.

## 10.3.2 Overview of Ongoing Approval Tasks

Switch to Request management to see an overview of ongoing approval tasks. In Assigned tasks you can filter by approval task, or you can go straight to the "Approval tasks" tab.

Only terminologists have access to this area.

The dialog box lists all current approval processes.

### "Read" and "unread" tasks

In all task lists, the buttons "Mark as read" and "Mark as unread" are available. Depending on the current task, one of these is always greyed out. Unread tasks are always displayed in bold, like in Outlook. By clicking the respective button, you can change the state.

A task is automatically changed to "read" when you select it in the list. With the "Hide read tasks" option you can hide the read tasks and only display the unread ones.

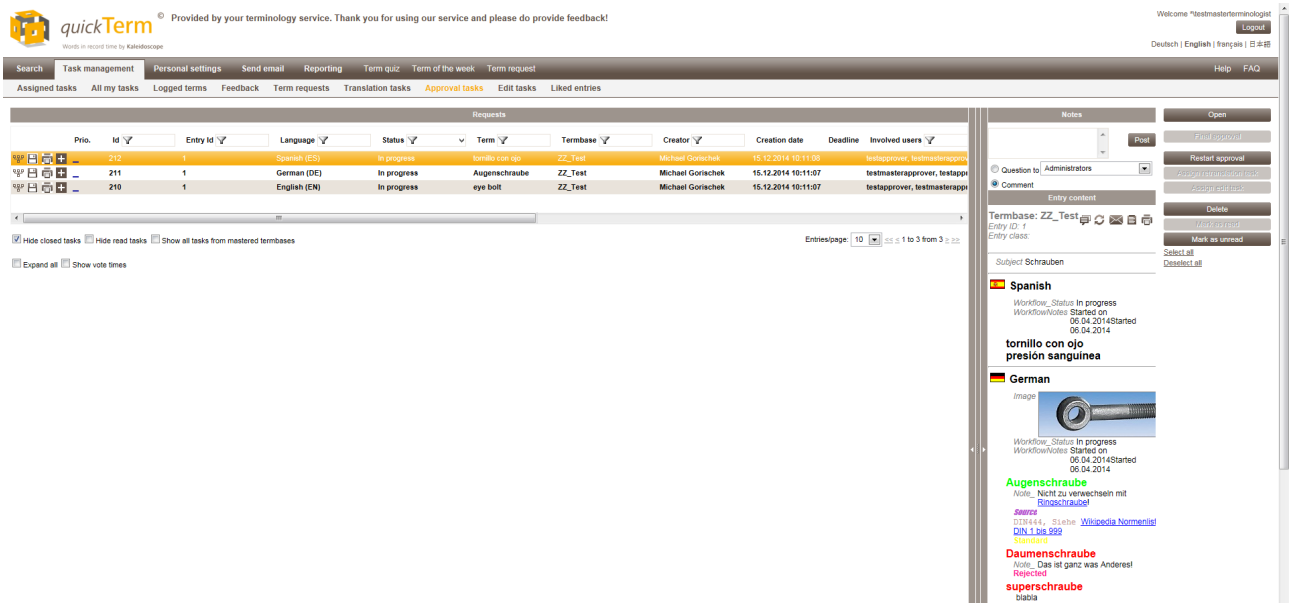
## Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

In order to select more than one task, you can click on *Select all*. By clicking on *Deselect all* you can then deselect all the selected tasks again. Used in combination with the filter function, this makes it easy to edit the task list.




*Overview of approval tasks*

In this dialog box, you can do the following:

- Restrict the approval process display: To do so use the checkboxes at the bottom left, *Hide already closed tasks* and *Show all tasks from main termbases*. If you are configured as the main terminologist with responsibility for several termbases, you can control how the approval processes are displayed here.
- Color codes: If the deadline for an approval task has passed, the task is highlighted in red; closed approval tasks are highlighted in gray. Approval tasks where you can assign a re-translation task are highlighted in orange.
- "Status" column:

This allows you to sort the display by status, with various options that can be selected:

- "Rejected"

  Approval tasks for which the terminologist cannot issue final approval because they have been rejected by one of the assigned approver groups.

- "Closed"

  Approval tasks for which final approval has already been issued or has already closed.

- "All approved"

  Approval tasks for which the voting process has already been completed (all approver groups have voted to approve the term) and the terminologist can issue final approval.

- "In progress"

  Approval tasks on which no one has as yet voted, or whose voting process has started but is not yet complete.

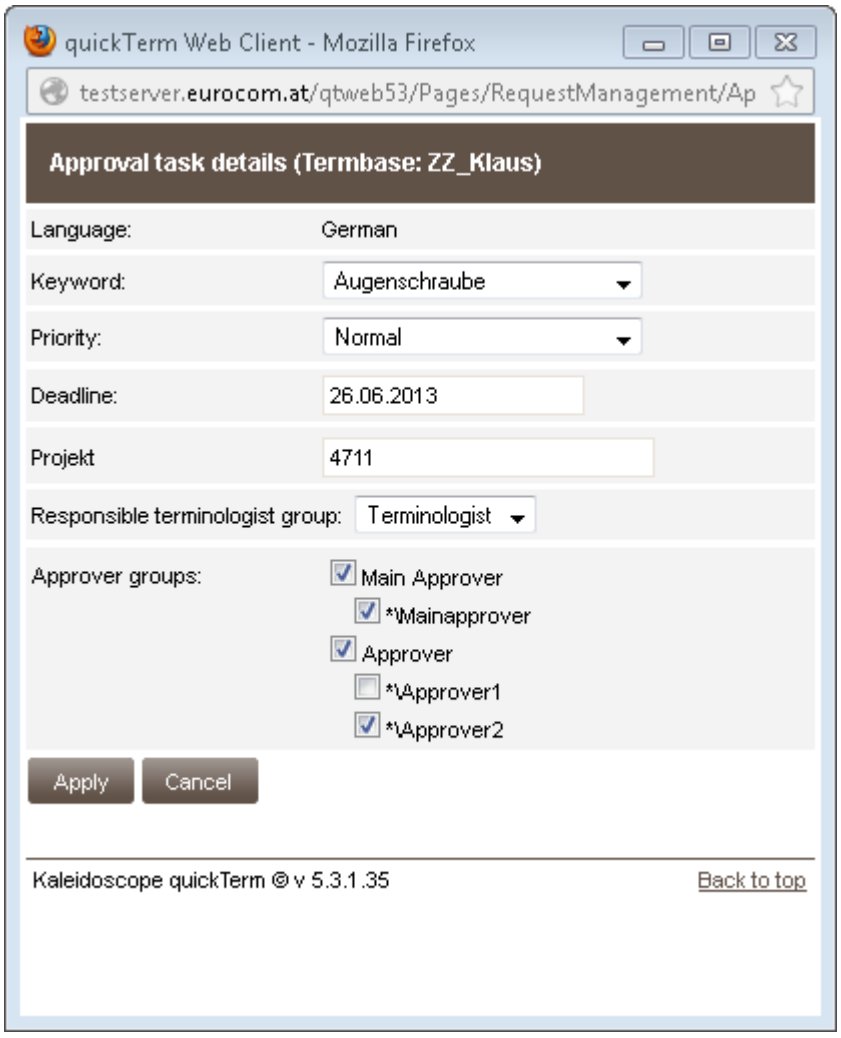
- Monitor current approval processes. A checkmark or cross shows you which groups have already approved (green checkmark) or rejected (red crossed out box) which entries. Abstentions are indicated by a – in the box.

- With cascaded ( icon) and non-cascaded approval processes you can click on the *plus symbol* ("Show/Hide details") to expand the approval process. You will then see the individual votes for groups involved in voting procedures. The first checkbox in an expanded group, or the only checkbox in a collapsed group shows you the status of the entire group. For instance, if a set number of voters in a voting approval group have voted on or approved an entry, a green checkmark automatically appears in the box.

- You can also print out approval tasks ( icon). When you click on this icon, the *Select target languages* dialog box opens where you can select the target languages and the printing order. The stylesheet for printouts is described elsewhere.

- *Expand all* option at the bottom right: When you select this option the *plus symbol* for all approval processes is automatically enabled, expanding all the processes. When you remove the checkmark, all approval processes are collapsed.

- By clicking on *Show time stamp* in the right lower corner underneath the list, you can display the actual time and date when each approver cast his vote. You can always enlarge a column by dragging or double clicking on the right-hand side of the column heading.
- You can also directly click on the various boxes and thus "override" the approvals of the respective group, i.e., cancel or perform the approvals yourself. To avoid accidental changes, you must still click on the small floppy disk icon ( , "Save changes") on the far left to save the change.
- Click on *Open* to process the approval task, by adding or removing approver groups (using the checkmarks), and where applicable changing the keyword, the priority, deadline, the content of the custom field and the assigned terminologist group for the approval task.




*"Approval task details" dialog*

## Actions

- "Final approval"

If an entry has been approved by all groups, you can issue your final approval after a final check. See Giving Final Approval.

- "Answer Info Request"

  The red question mark symbol (means "waiting for information") in the appropriate approval task column indicates there is an info request pending.

- "Restart Approval"

  You can enter a special message here, and change the priority and deadline (e.g. for overdue approval tasks). When you click on this button, the existing approval process is deleted and recreated.

- "Re-assign translation task"

  You can redefine the usage status here.

- "Delete"

  You can delete the approval task. You will then no longer be able to issue final approval via quickTerm. For example, this is useful if you receive rejections from the approvers and want to edit the entry. After editing the entry, start a new approval task.

## 10.3.3 Giving Final Approval

Once all approvers for a language have approved an entry, the terminologist is notified by e-mail. The terminologist can always see the progress of approvals in the approval list. By selecting the "All approved" filter option in the Status column, the list will only show those entries that can be processed for final approval.

To give final approval for an entry:

a) Highlight the relevant entry in the list of currently pending approvals.

b) Click on "Open" and check the data.

c) Click on *Final approval* to give final approval.

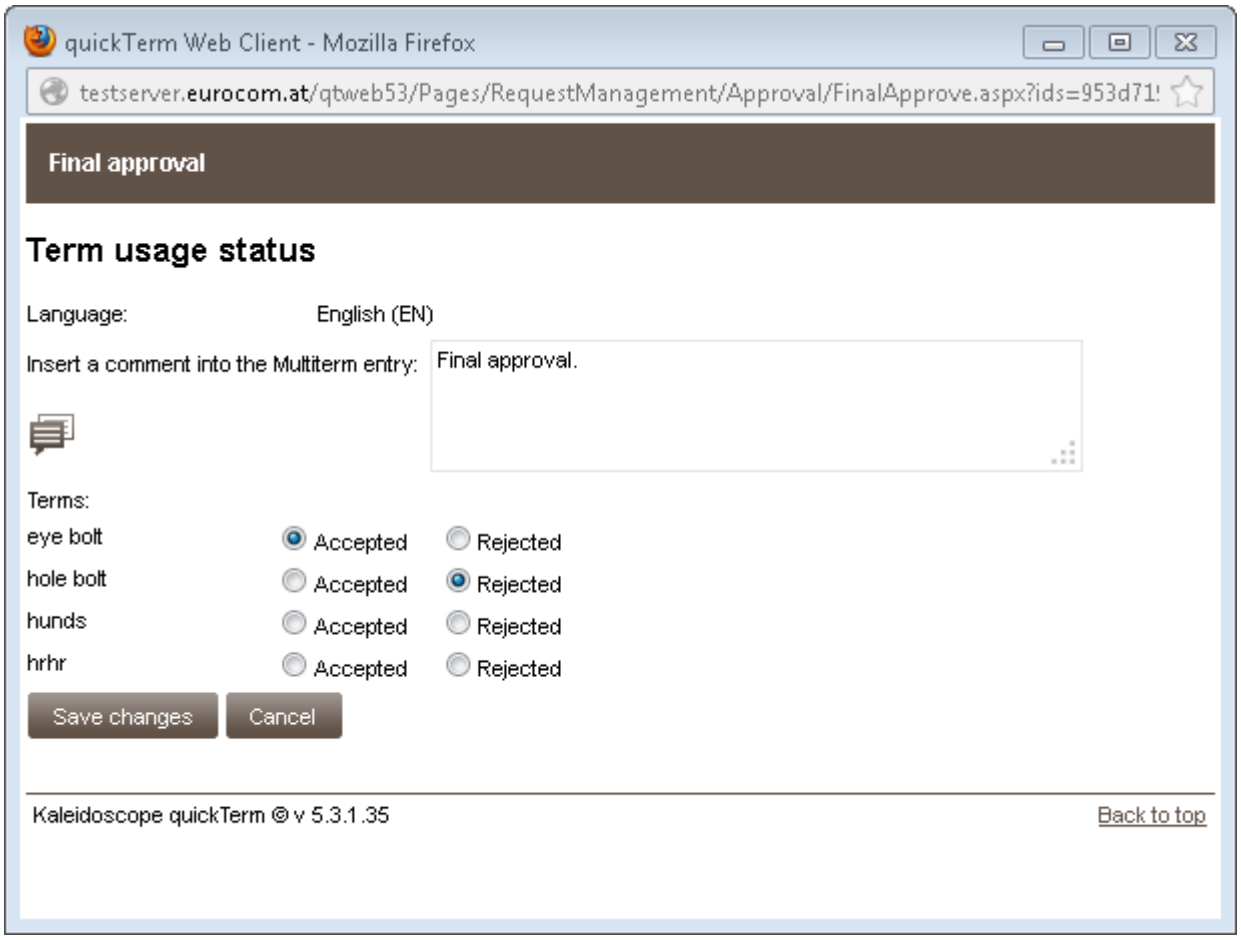
   ⇨ The "Term usage status" dialog opens.

d) You have the option of entering a comment in the field or copying the entire comments trail using the small icon on the left and then editing this if necessary.

e) Define the usage status for each term.

⇨ The entry is given final approval. quickTerm sets the appropriate status in the termbase and quickTerm.

⇨ Participants in the process and all groups that have "subscribed" to notifications about approvals are notified.




*"Final approval" dialog*

## 10.3.4 Answering an Info Request

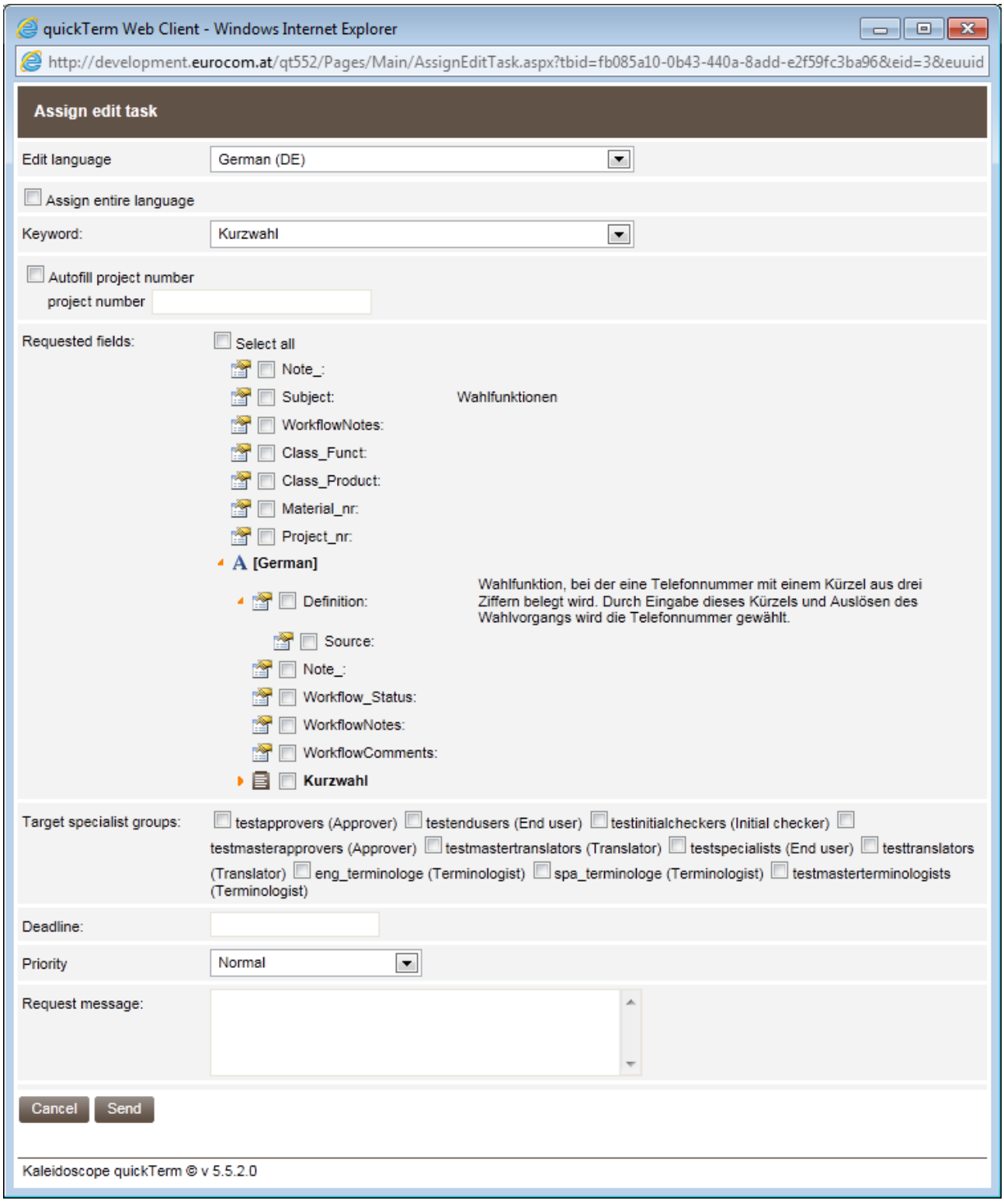
If the "?" symbol appears in a row this indicates that an info request is pending.

## 10.3.5 Restarting Approval

With this function the terminologist or main approver can restart an approval task from the beginning. This function will start a new approval task and set the status of the previous one to "restarted". In addition to a message to the approver, you can also enter the priority and the (new) deadline here in the same way as for other approval tasks.

## 10.3.6 Assigning an Edit Task

If an approval task has been rejected, then you can immediately turn it into an edit task right from the task list.




*"Assign edit task" dialog*

a) Select the rejected approval task in the list of approval tasks.

a) Click on "Assign edit task".

⇨ The "Assign edit task" dialog opens.

b) At the top select the language in which the additional information will be provided.

c) You can either assign all fields of a language to the edit task by clicking on "Assign entire language", or you can select individual fields from the tree.
If you have selected the entire language, then all fields on language and term levels are sent into edit. If you also want to assign the entry level fields, you can choose that option, too.

d) Below this select one of the terms in this entry as the "title" for this edit task.

e) Specify whether the custom field should be autofilled, or enter the corresponding value.

f) In the tree structure select the fields that need to be completed for this request. Checking "Select all" makes field selection easier. The checkbox on the far right specifies whether or not this is designated as a mandatory field.

g) Below this select at least one of the specialist groups, or one terminologist group for temporary delegation.

h) If required select a deadline.

i) Set one of the three available priorities.

j) You can also enter a comment to the receiving users.

k) Click on "Send".

⇨ The edit task is created. The specialists will now edit and vote and at the end of the process feed back an agreed suggestion.

**Check for Multiple Edit Tasks**

If you want to assign a further edit task for one and the same field in an entry, you will receive an error message informing you of this.

**Edit tasks for sub-fields**

You can only assign edit tasks for sub-fields in an entry if the relevant main field is available in the entry. Otherwise, you will get an error message and/or the checked sub-field will be ignored.

## 10.4 Workflow for Edit Tasks

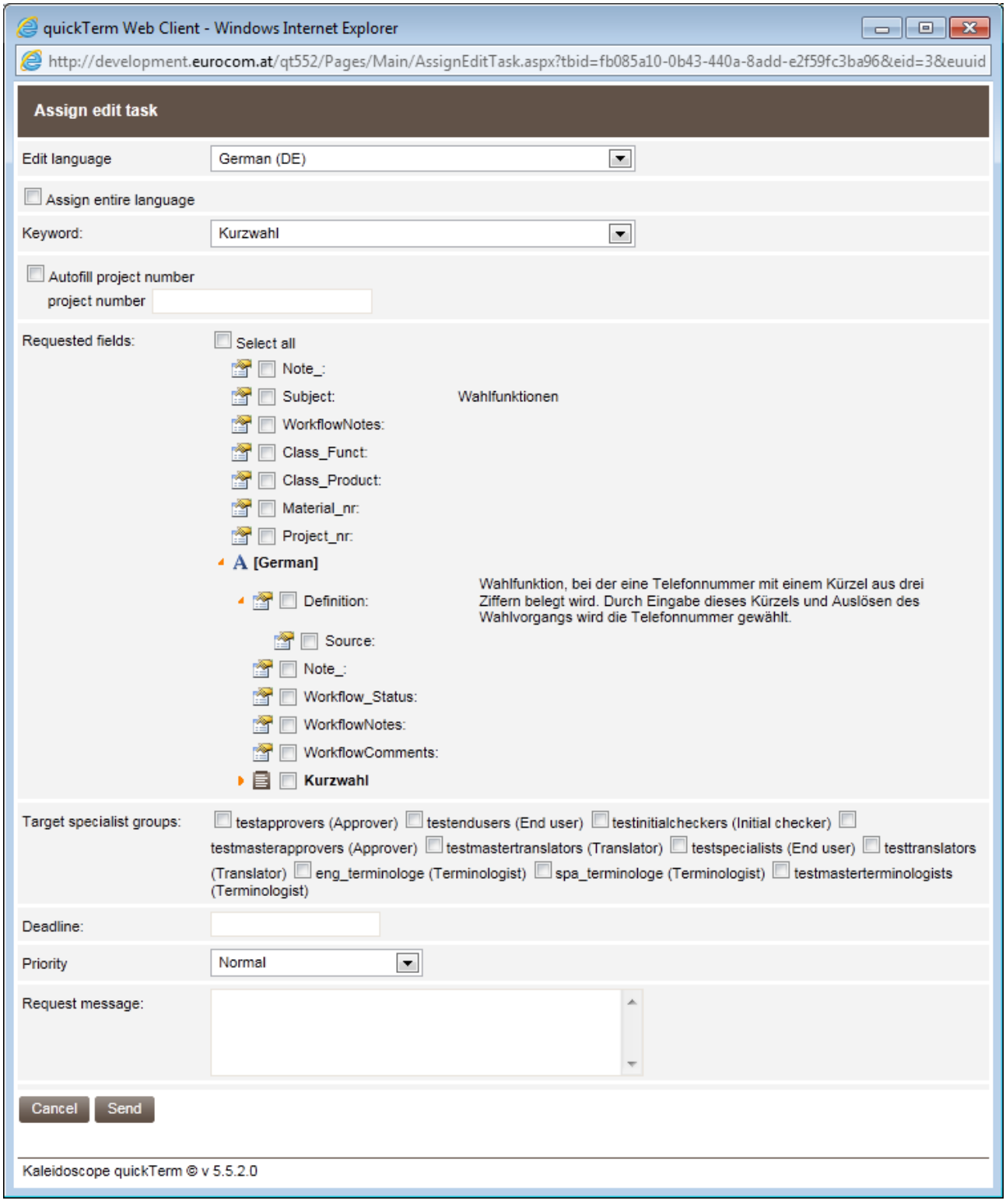
Terminologists can use edit tasks to retrieve additional information from one or several configured specialist groups. Edit tasks can be started both for term requests and for termbase entries. During the process you specify which fields specialists need to complete.

The specialists then vote on the content of the selected fields and eventually approve them. As the terminologist you can then apply the information directly to the termbase and/or the term request.

Alternatively, edit tasks can be assigned to just one terminologist group. This process is also known as temporary delegation. This only works if more than one terminologist groups are present in your configuration.

### 10.4.1 Assigning an Edit Task

As the terminologist you can assign an edit task both for an existing termbase entry and for a term request.




*"Assign edit task" dialog*

a) Search for the entry in the search screen, or select the related term request (with status "In progress" or "Created") in the term request list.

a) Click on "Assign edit task".

⇨ The "Assign edit task" dialog opens.

b) At the top select the language in which the additional information will be provided.

c) You can either assign all fields of a language to the edit task by clicking on "Assign entire language", or you can select individual fields from the tree.
If you have selected the entire language, then all fields on language and term levels are sent into edit. If you also want to assign the entry level fields, you can choose that option, too.

d) Below this select one of the terms in this entry as the "title" for this edit task.

e) Specify whether the custom field should be autofilled, or enter the corresponding value.

f) In the tree structure select the fields that need to be completed for this request. Checking "Select all" makes field selection easier. The checkbox on the far right specifies whether or not this is designated as a mandatory field.

g) Below this select at least one of the specialist groups, or one terminologist group for temporary delegation.

h) If required select a deadline.

i) Set one of the three available priorities.

j) You can also enter a comment to the receiving users.

k) Click on "Send".

⇨ The edit task is created. The specialists will now edit and vote and at the end of the process feed back an agreed suggestion.

**Check for Multiple Edit Tasks**

If you want to assign a further edit task for one and the same field in an entry, you will receive an error message informing you of this.

**Edit tasks for sub-fields**

You can only assign edit tasks for sub-fields in an entry if the relevant main field is available in the entry. Otherwise, you will get an error message and/or the checked sub-field will be ignored.

## 10.4.2 Overview of Ongoing Edit Tasks

To switch to the overview of ongoing edit tasks in Request management, click on the "Edit tasks" tab.

Only terminologists have access to this area.

The dialog box lists all current edit tasks. By clicking on the display options at the bottom of the screen you can select the following views (several options can be selected):

- Hide already closed tasks
- Hide read tasks
- Show all tasks from main termbases

  This option is only present if you are the main terminologist responsible for all termbases.

Click on "Expand all" to show all the individual voting results in the full list.

**Possible statuses for edit tasks and what they mean**

- "Initial checking"

  When an end user requests a change, it is assigned to the initial checker. If no initial checker is configured, it goes directly to the terminologist.

- "Request"

  If an end user requests a change and an initial checker has not been defined or if the initial checker has completed his check, the change request is assigned to the terminologist.

- "Rejected request"

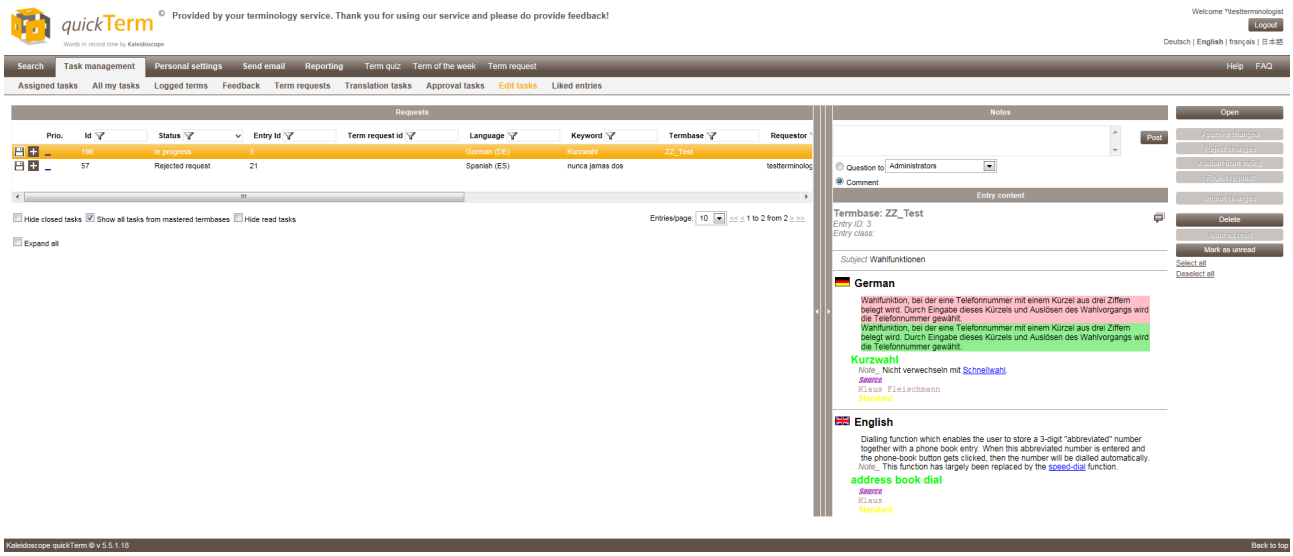
  When a terminologist or initial checker rejects the request submitted by an end user, i.e., the request is not converted into a task.

- "In progress"

  When the terminologist creates a new edit task – either a completely new task, or by converting a request into a task.

- "Closed"

  As soon as the terminologist uses an edit task, i.e., the changes are written to the entry or term request.




*Overview Edit Tasks*

In this dialog you can perform the following actions:

- Monitor current edit tasks

  A checkmark, cross or minus symbol shows you which groups have already approved (green checkmark) or rejected (red crossed out box) which entries, and those that have abstained from voting (minus symbol). The "Temporary delegation" icon ( ) indicates that a task was temporarily delegated from one terminologist to another terminologist group. This is done by manually assigning the edit task to a different group.

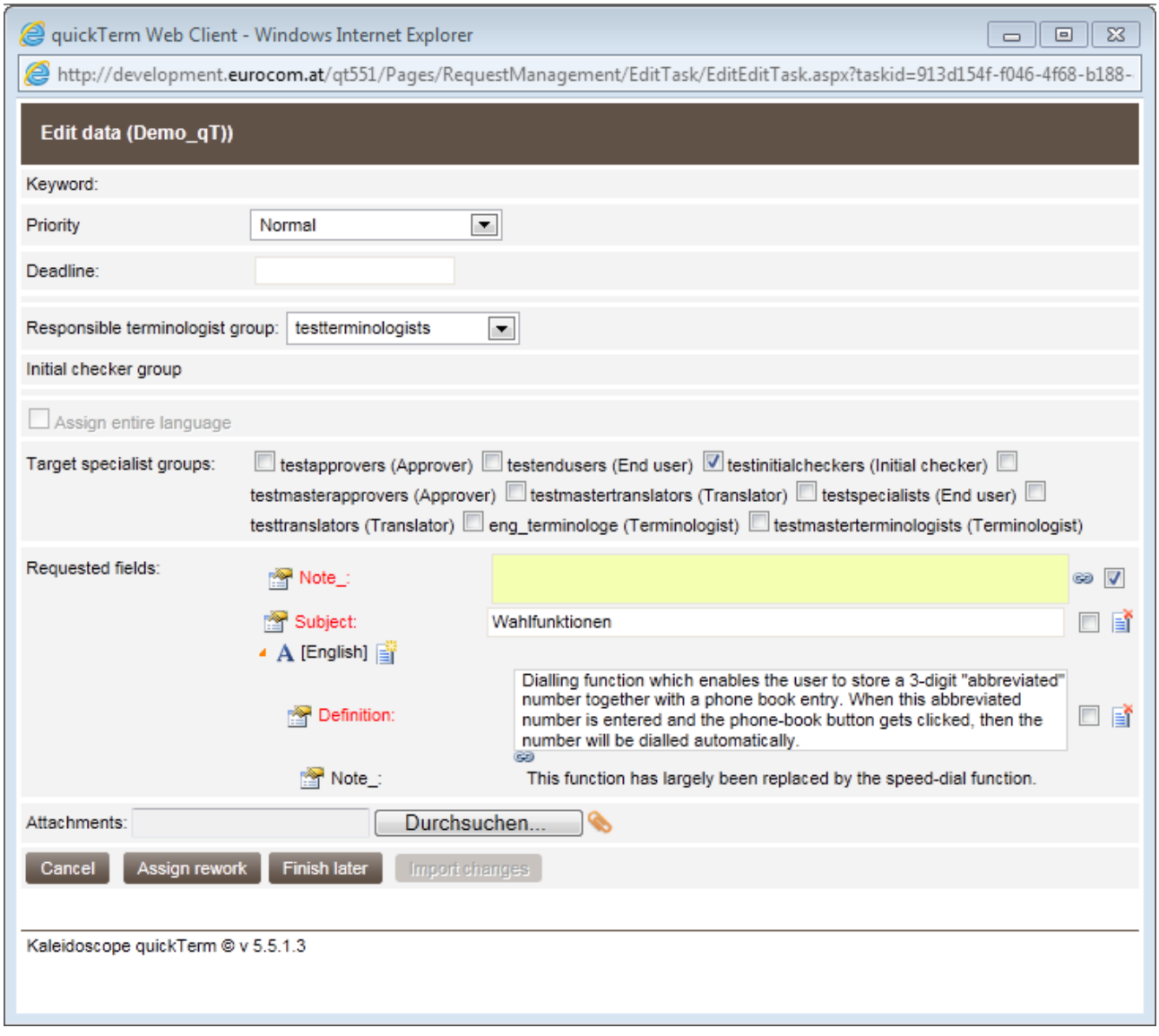
- You can also click directly in the various boxes and thus "override" the edit tasks for the respective group, i.e., cancel or perform the approvals yourself. To avoid accidental changes, you must still click on the small floppy disk icon "Save direct changes" on the far left to save the change.
- To the right of the vertical divider bar you can see the work that has already been carried out for this task and any comments from the editor. Old field values in the entry are highlighted in red and new values are highlighted in green.
- When an edit task has been approved by all groups, you can apply it to the details view in the termbase entry or the term request. For more details see Fertige Zusatzinformation übernehmen.
- You can also reject an edit task.
- In addition, depending on the status, you can ask for information (only enabled if the requestor is not an anonymous end user) or answer a received information request.

- By clicking on "Delete", you can delete an edit task.

You can add new comments or make subsequent changes to your own comments. The terminologist can also see these comments and, if applicable, respond to information requests. You can also send targeted questions to individual groups.

You can copy the comment text in quickTerm Client (place the cursor in the comments area and right-click).

## 10.4.3 Applying Completed Additional Information




*"Edit task" dialog*

Once all groups have approved an edit task, you can apply the information provided to the termbase entry or the term request.

➢ You have selected the desired edit task in the list.

a) Click on "Open".

⇨ The "Edit task" dialog box opens:

b) If the edit task has already been approved, click on Import changes to apply the additional information shown in red to the termbase or the term request.

⇨ The information is incorporated directly into the termbase or applied to the term request.

Alternatively, you have the option of changing or deleting the entered values, or re-assigning the edit task.

**Applying the changes**

It is possible to apply the changes directly from the list, without opening the edit task dialog. To do so, click on "Import changes" in the list of buttons next to the details view.

## 10.5 Workflow for Translation

"Translating" a term into different languages can be initiated from various places:

- Each user (if configured)
  - Translation request, with an optional translation suggestion included
  - Direct editing of an entry
- Terminologists
  - Launching a translation task
- Translator
  - Providing a translation suggestion
- quickTerm Tools

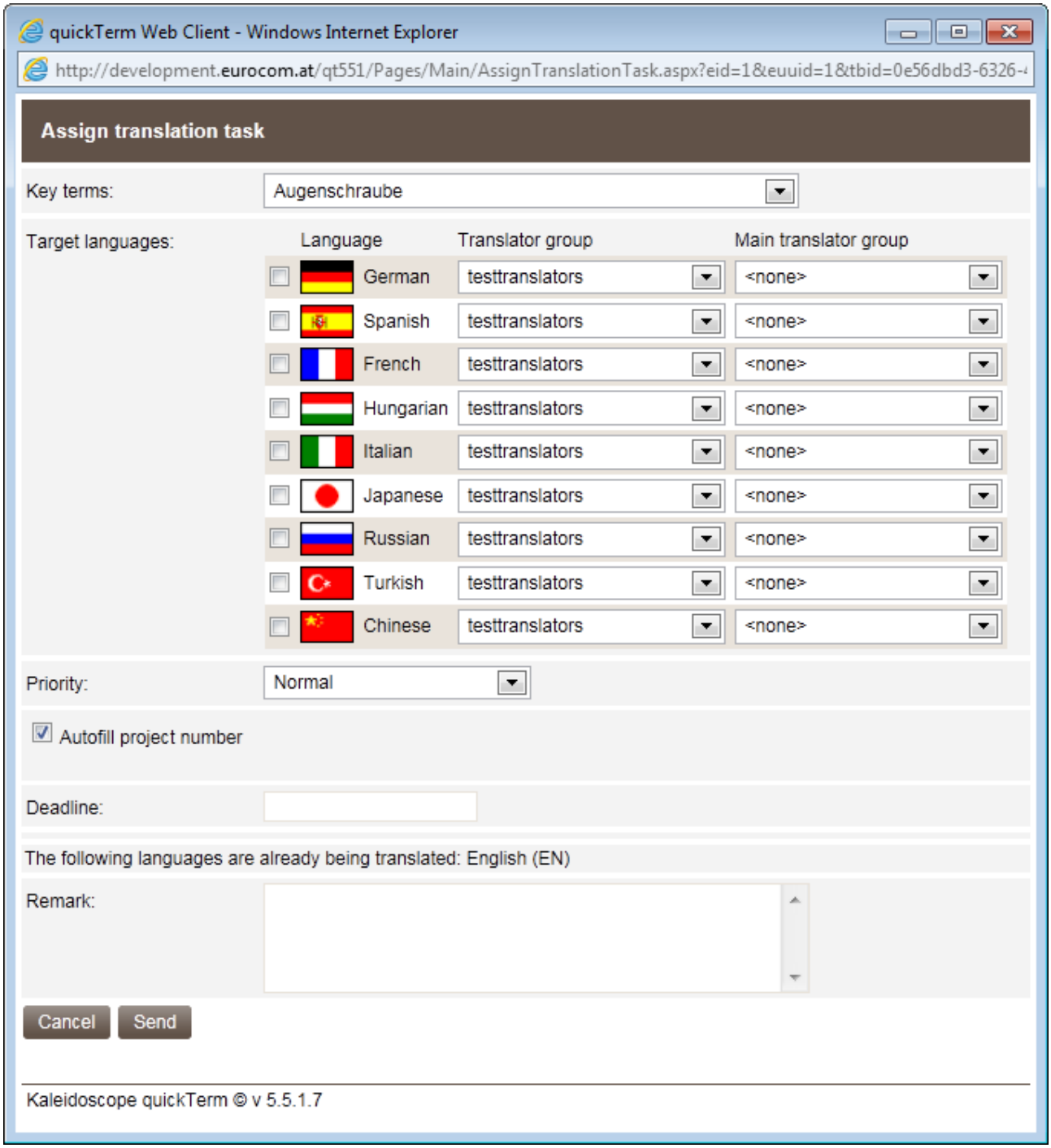
  Automatic creation of translation tasks

### 10.5.1 Initiating Translation

To initiate the translation of an existing entry into a new language:

a) Click on "Assign translation task" in the search screen.

⇨ The "Assign translation task" dialog box appears.




*"Assign translation task" dialog*

b) Select a key term. This will then become the "Title" of the translation task. Ideally, this should be the preferred term.

c) Select the required target languages and the translator group and, if possible, the main translator group to which you want to assign the task.

⇨ The translator receives an e-mail about the submitted translation task and can process this in their Request management.

Once the translator finalizes a translation request, depending on the configuration and if applicable, it is sent to the main translator (in the case of a cascaded translation process) and then automatically or optionally sent for approval, or it is entered in the termbase as "final". Translation tasks are given final approval by the main approver, not the terminologist.

## 10.5.2 Overview of Ongoing Translation Processes

Switch to Request management to see an overview of ongoing translation processes. In "Assigned tasks" you can filter by translation task, or you can go straight to the "Translation tasks" tab.

Only terminologists have access to this area. In the *Type* and *Status* columns you can apply the following filters (several options can be selected):

- *Type*: Request, Suggestion, Assignment.
- *Status*: This column has up to 16 attributes; see below for details.

In these areas you can:

- Review the status of translation processes.
- Edit the translation data depending on status by clicking on *Open*.
- *Reject a translation request*.
- *Export entry IDs* that appear in this overview as a .txt file. This supports translation outside quickTerm (e.g., using Excelling MultiTerm in Studio).
- Click on *Delete* to delete a specific task. This also removes the task for the translators.
- Click on *View entry* to display the selected entry in the dialog box.

### Possible statuses for translation tasks and what they mean

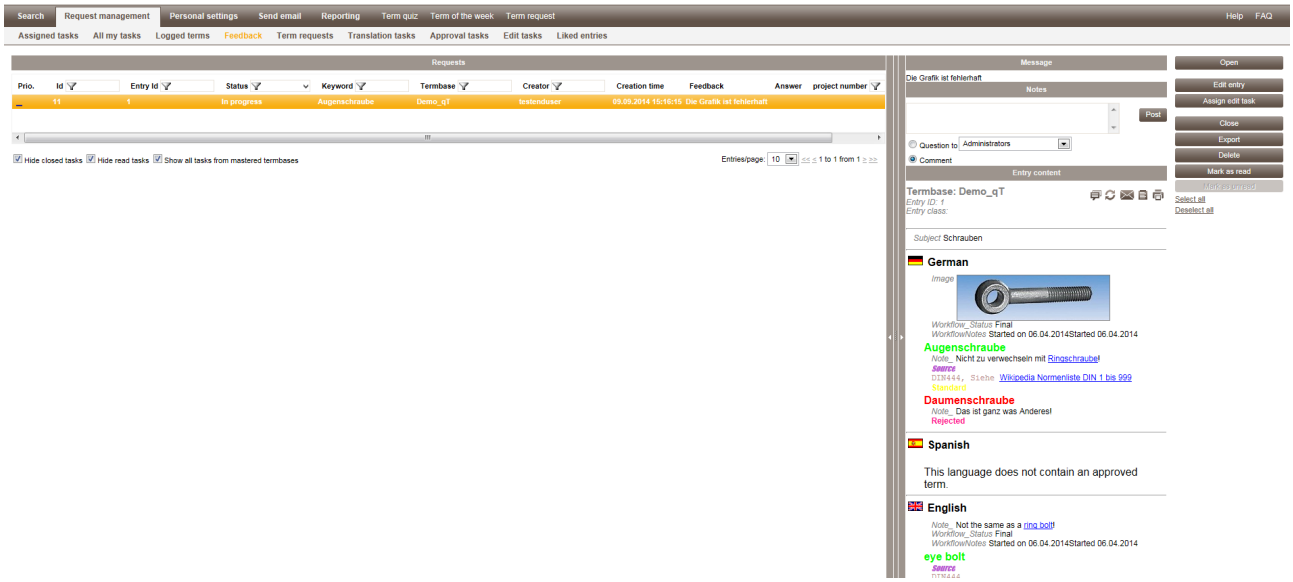
- Initial checking: A new translation request has been created and assigned to the initial checker.
- Initial checker waiting for requestor: Initial checker has asked the requestor for information.
- Request: The request is assigned to the terminologist, if an initial checker is not involved, or if the initial check has been completed.
- Rejected request: The initial checker or terminologist has refused the request.
- Terminologist waiting for requestor: The terminologist has asked the requestor for information (about a request).

- Terminologist waiting for initial checker: The terminologist has asked the initial checker for information (about a request).
- Assigned to translator: The terminologist has converted the request into a task and assigned it to the translator.
- Rejected by translator: The translator has rejected the task for some reason.
- Initial translation provided: The translator has processed the task and provided a translation.
- Waiting for terminologist: The translator has asked the terminologist for information.
- Translator waiting for check: The translator has assigned the task to the master translator to check.
- Master waiting for terminologist: The master translator has asked the terminologist for information.
- Approving: The translation task has been written to the termbase and the approval process has been initiated.
- Approved: The translation has been approved.
- Rejected by approver: The translation has been rejected.
- Closed: The task has been closed.

## 10.6 Workflow for Terminology Feedback

As the terminologist in Request management you are able to view feedback from users on existing entries.

Switch to the Request management screen. In "Assigned tasks" you can filter by feedback, or you can go straight to the "Feedback" tab. Only terminologists have access to this area.




*Overview of feedback in quickTerm Web*

The dialog box lists all feedback. The following filters can be applied:

- Using the checkboxes "Hide already closed feedback", "Hide read tasks" or "Show all tasks from main termbases". The last option is only available if the main terminologist has been assigned more than one termbase.
- Filter by Status

## Possible statuses for feedback and what they mean

- "In progress"

  Assigned to the terminologist, waiting for his assessment.

- "Edit task assigned"

  An edit task was created based on this feedback

- "Waiting for information"

  The terminologist has asked the requestor for information.

- "Closed"

  The terminologist has dealt with the feedback and it is now closed.

In this dialog box, you can do the following:

- Read feedback by viewing the comments in the feedback column, or by clicking on "Open" to view the whole text. You can also see the text at the top right in the entry view under "Message".
- Directly edit the entry related to the feedback by clicking on "Edit entry". This button is only active if the feedback is in the "In progress" status and you have the right to directly edit an entry.

- Create an edit task based on the feedback by clicking on "Assign edit task". This button is only active if the feedback is in the "In progress" status.
- Close the feedback and add a message that will then appear next to the closed feedback in the "Note" column.
- Delete the feedback by clicking on "delete".

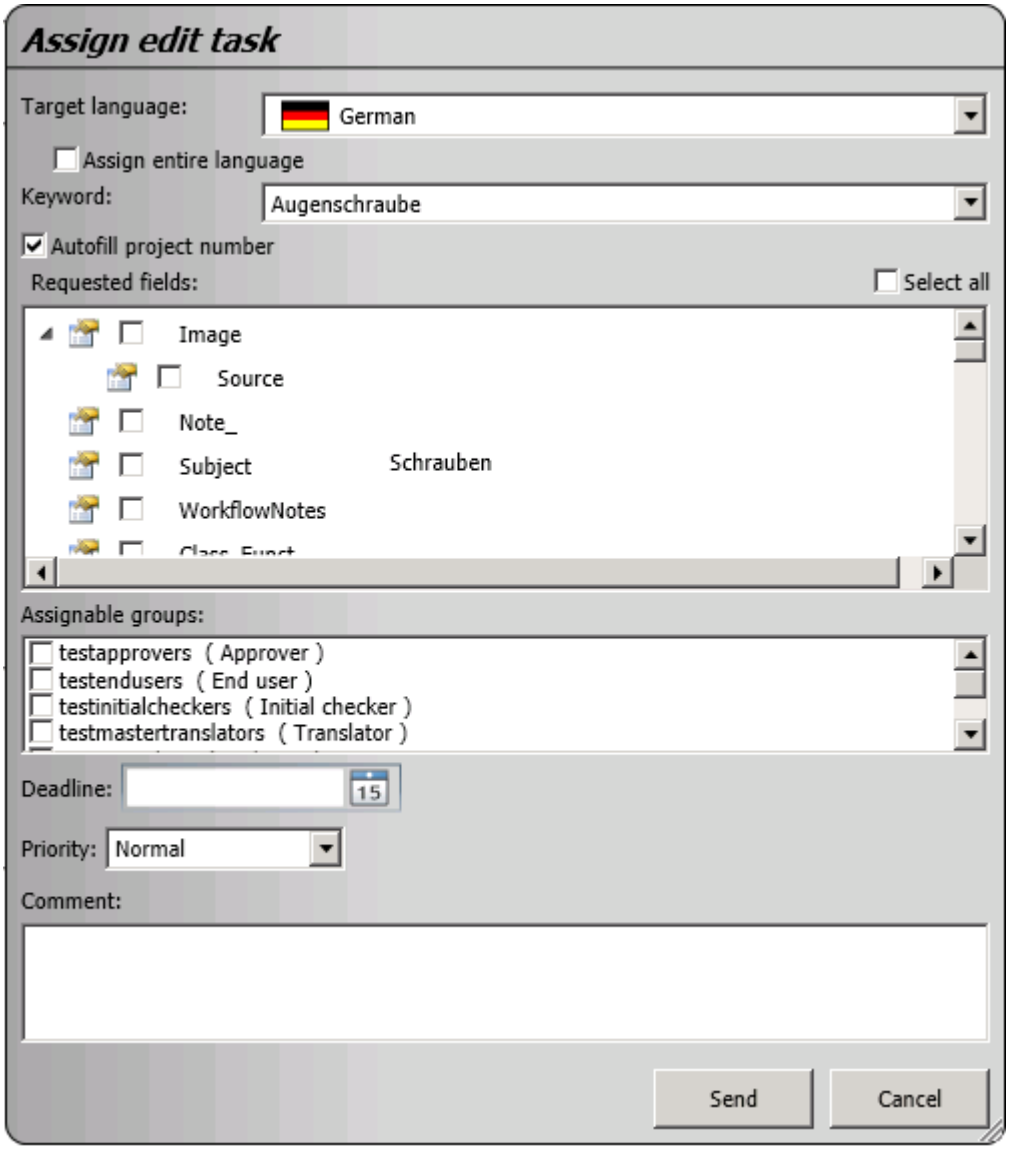
The feedback function in quickTerm is a "one-way street". That means you cannot act on the feedback itself, and the creator will not be notified about what has been done with his feedback. Rather, feedback serves as an input for the terminologist, who can then take this feedback and create an edit task or directly edit the entry.

## "Read" and "unread" tasks

In all task lists, the buttons "Mark as read" and "Mark as unread" are available. Depending on the current task, one of these is always greyed out. Unread tasks are always displayed in bold, like in Outlook. By clicking the respective button, you can change the state.

A task is automatically changed to "read" when you select it in the list. With the "Hide read tasks" option you can hide the read tasks and only display the unread ones.

## 10.6.1 Assigning an Edit Task




*"Assign edit task" dialog*

a) Select the feedback you want to work with.

a) Click on "Assign edit task".

⇨ The "Assign edit task" dialog opens.

b) At the top select the language in which the additional information will be provided.

c) You can either assign all fields of a language to the edit task by clicking on "Assign entire language", or you can select individual fields from the tree.

If you have selected the entire language, then all fields on language and term levels are sent into edit. If you also want to assign the entry level fields, you can choose that option, too.

d) Below this select one of the terms in this entry as the "title" for this edit task.

e) Specify whether the custom field should be autofilled, or enter the corresponding value.

f) In the tree structure select the fields that need to be completed for this request. Checking "Select all" makes field selection easier. The checkbox on the far right specifies whether or not this is designated as a mandatory field.

g) Below this select at least one of the specialist groups, or one terminologist group for temporary delegation.

h) If required select a deadline.

i) Set one of the three available priorities.

j) You can also enter a comment to the receiving users.

k) Click on "Send".

⇨ The edit task is created. The specialists will now edit and vote and at the end of the process feed back an agreed suggestion.

**Check for Multiple Edit Tasks**

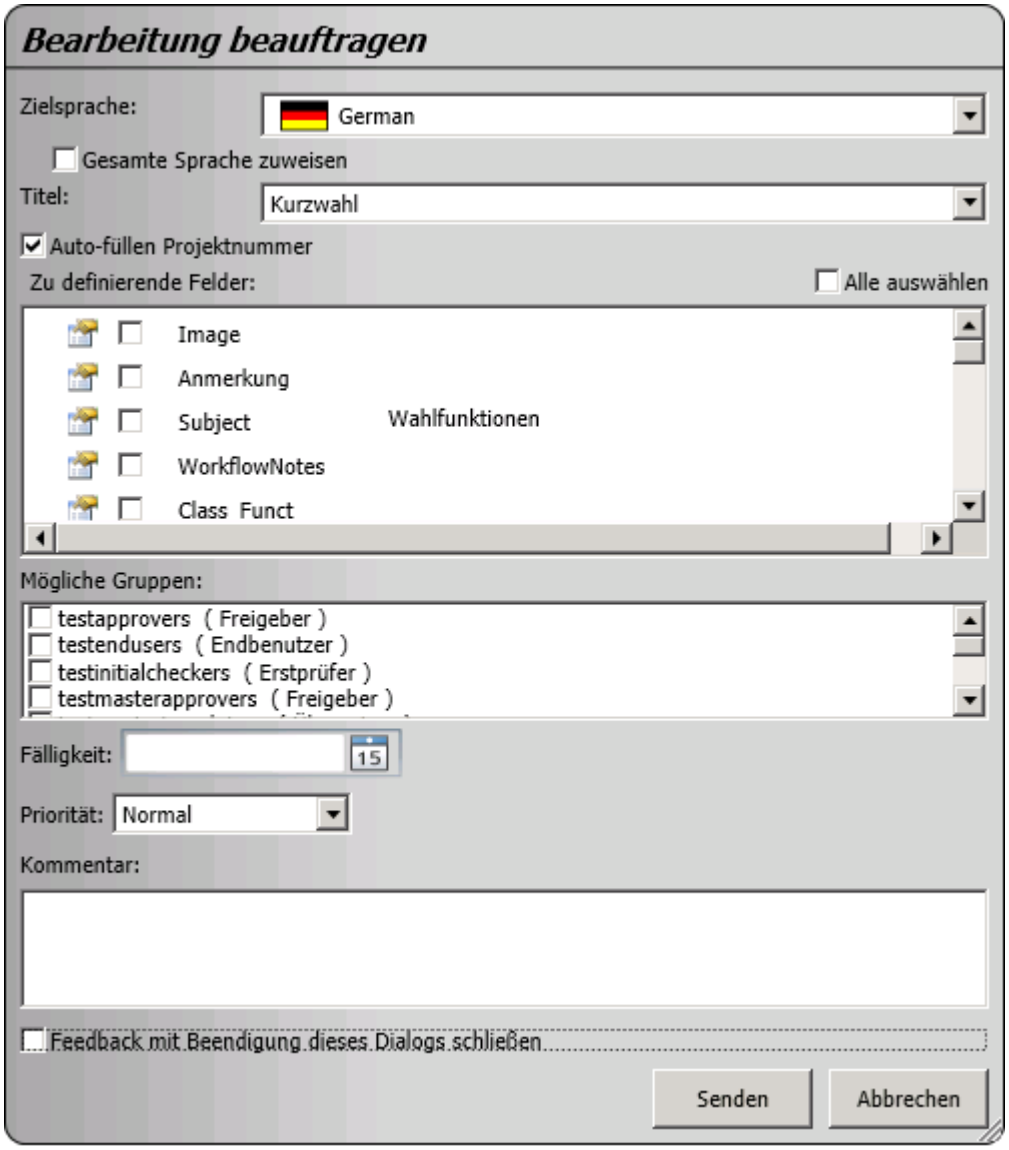
If you want to assign a further edit task for one and the same field in an entry, you will receive an error message informing you of this.

**Edit tasks for sub-fields**

You can only assign edit tasks for sub-fields in an entry if the relevant main field is available in the entry. Otherwise, you will get an error message and/or the checked sub-field will be ignored.

You can close the selected feedback by clicking on "Close feedback on submitting this form". In addition, you can add a comment to the feedback in this form.

## 10.6.2 Edit entry




*"Edit entry" dialog*

a) Select the feedback you want to work with.

a) Open the entry by running a search for it.

b) Click on "Edit entry".

⇨ The "Edit entry" dialog box opens. The entry has to contain at least one language before it can be saved.

By clicking on the Button you can delete the content of the respective fields of an entry.

By clicking on the button you can add new languages to the entry. If a translation task is already running for a certain language, this language

will not be shown in the list and you cannot add it.

By clicking on you can delete a complete language from an entry. Before quickTerm deletes a language, you will be asked if you are sure.

a) Eventually, click on "Save changes" to save the changes to the termbase.

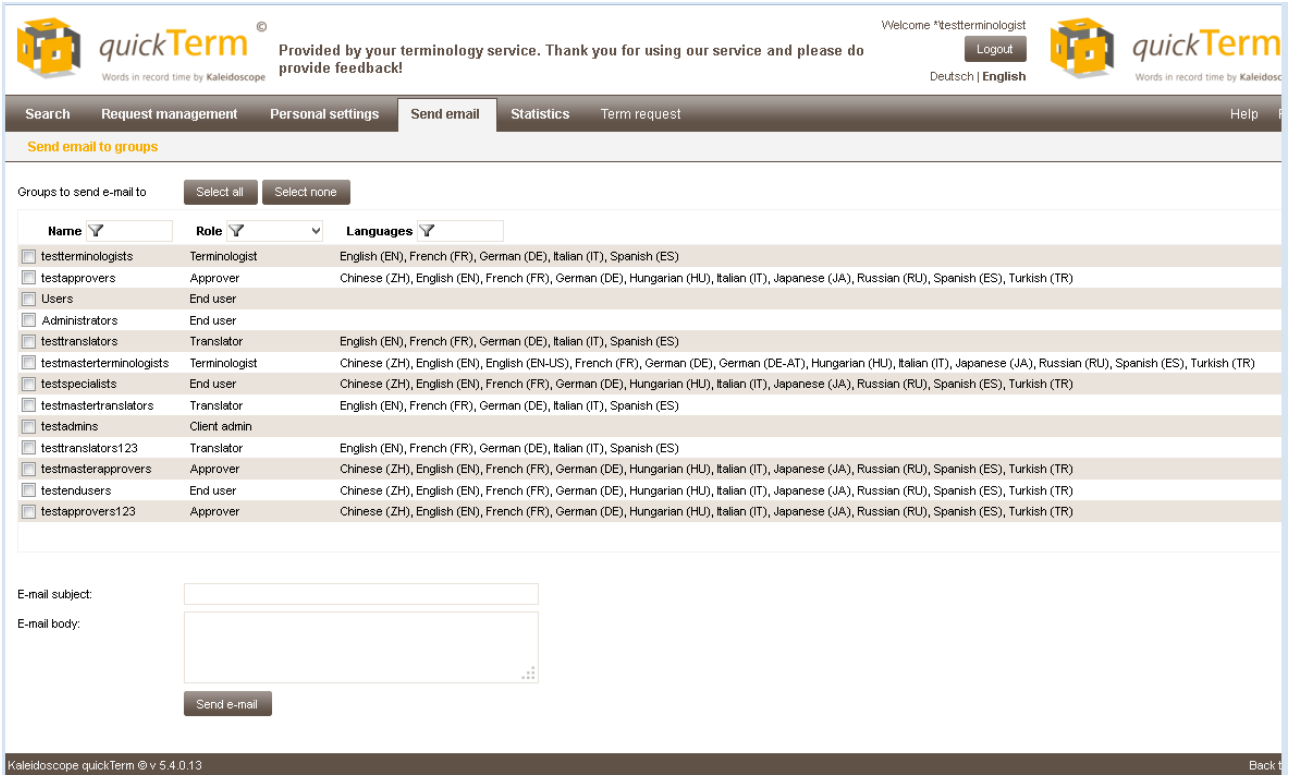
**Locked fields and locked languages**

quickTerm automatically locks fields and languages for which a translation or edit task are currently running. The ⚠ icon indicates that these fields are locked.

You can close the selected feedback by clicking on "Close feedback on submitting this form". In addition, you can add a comment to the feedback in this form.

## 10.7 Sending Batch E-mails

This function allows terminologists that use quickTerm groups as mailing lists to send individual e-mails (e.g. on new entries) to specific users.


quickTerm
Words in record time by Kaleidoscope
Provided by your terminology service. Thank you for using our service and please do provide feedback!
Welcome *testterminologist
Logout
Deutsch | English
quickTerm
Search
Request management
Personal settings
Send email
Statistics
Term request
Help
Send email to groups
Groups to send e-mail to
Select all
Select none
Name
Role
Languages
testterminologists Terminologist English (EN), French (FR), German (DE), Italian (IT), Spanish (ES)
testapprovers Approver Chinese (ZH), English (EN), French (FR), German (DE), Hungarian (HU), Italian (IT), Japanese (JA), Russian (RU), Spanish (ES), Turkish (TR)
Users End user
Administrators End user
testtranslators Translator English (EN), French (FR), German (DE), Italian (IT), Spanish (ES)
testmasterterminologists Terminologist Chinese (ZH), English (EN), English (EN-US), French (FR), German (DE), German (DE-AT), Hungarian (HU), Italian (IT), Japanese (JA), Russian (RU), Spanish (ES), Turkish (TR)
testspecialists End user Chinese (ZH), English (EN), French (FR), German (DE), Hungarian (HU), Italian (IT), Japanese (JA), Russian (RU), Spanish (ES), Turkish (TR)
testmastertranslators Translator English (EN), French (FR), German (DE), Italian (IT), Spanish (ES)
testadmins Client admin
testtranslators123 Translator English (EN), French (FR), German (DE), Italian (IT), Spanish (ES)
testmasterapprovers Approver Chinese (ZH), English (EN), French (FR), German (DE), Hungarian (HU), Italian (IT), Japanese (JA), Russian (RU), Spanish (ES), Turkish (TR)
testendusers End user Chinese (ZH), English (EN), French (FR), German (DE), Hungarian (HU), Italian (IT), Japanese (JA), Russian (RU), Spanish (ES), Turkish (TR)
testapprovers123 Approver Chinese (ZH), English (EN), French (FR), German (DE), Hungarian (HU), Italian (IT), Japanese (JA), Russian (RU), Spanish (ES), Turkish (TR)
E-mail subject:
E-mail body:
Send e-mail
Kaleidoscope quickTerm © v 5.4.0.13

*"Send e-mail" dialog*

In this dialog you see all quickTerm recipient groups. You can filter and sort this list by name, role and language to select the precise group you want to send the e-mail to.

To send an e-mail:

a) Select the group of recipients on the left. The "Select all" and "Select none" buttons at the top may be useful at times.

b) At the bottom enter a subject and the text of your e-mail.

c) Click on "Send e-mail".

⇨ The e-mail is sent.

### Sending an Entry as a Link

This screen also opens when you "Send entry link in e-mail":

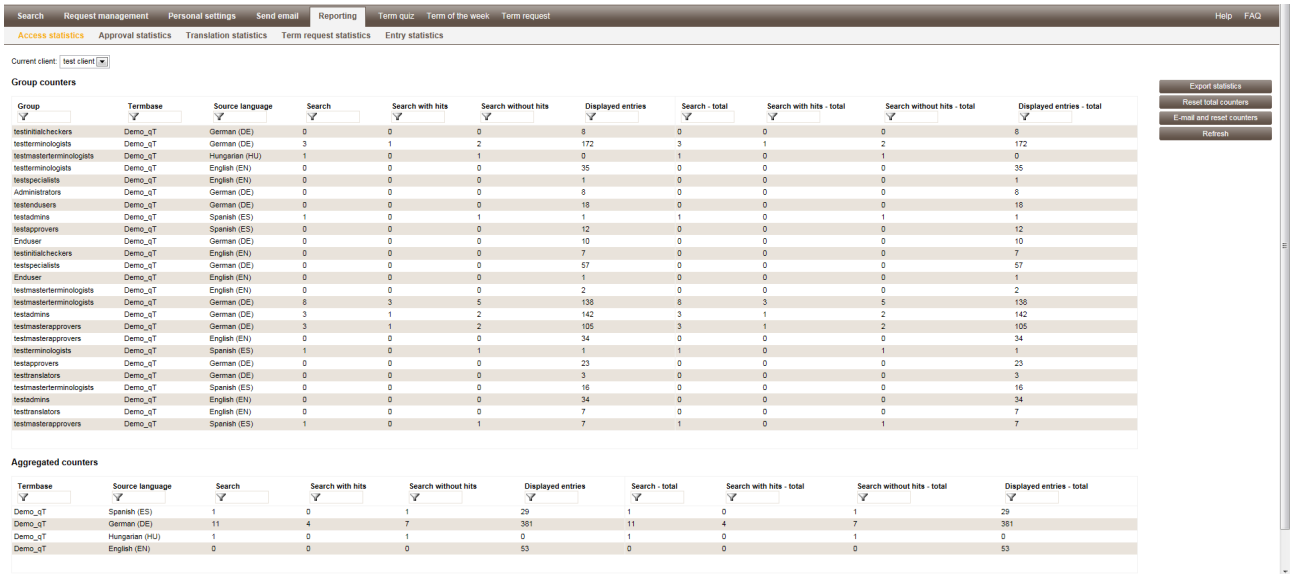
A prerequisite for this is that the web or server URL has been set up in the server config file (in quickTerm Web this requirement is already met).

In the entry click on the *Send entry per e-mail* icon ( ) at the top. The *Send e-mail* screen then opens where you can highlight the recipient group(s) and enter a subject in the subject line. The link has already been entered in the text automatically. Finalize your action by clicking on *Send e-mail*.

## 10.8 Reporting

Client administrators and terminologists will find the following reporting options in quickTerm Web: Access, approval, translation, term request, and entry statistics.

### 10.8.1 Access statistics




*Can be found in the tab "Access statistics" in the "Reporting" tab.*

In the access statistics area you can view access data for the termbase as recorded by quickTerm.

This report is horizontally divided into two areas:

- "Group counters"

  The most granular way of grouping access data by user group / termbase / source language.

- "Aggregated counters"

  A less granular way of grouping access data by termbase and language.

User-level access statistics are not available due to data privacy law.

Vertically, both reports are divided into two areas separated by a vertical line.

- The first four columns before the divider show the access statistics for the most recent report period. The report period is always reset when the statistics are automatically or manually reset.
- The last four columns comprise the cumulative total access statistics.

## Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

A report can be initiated in two ways:

- Manually

  Via the "E-mail and reset counters" button

- Automatically

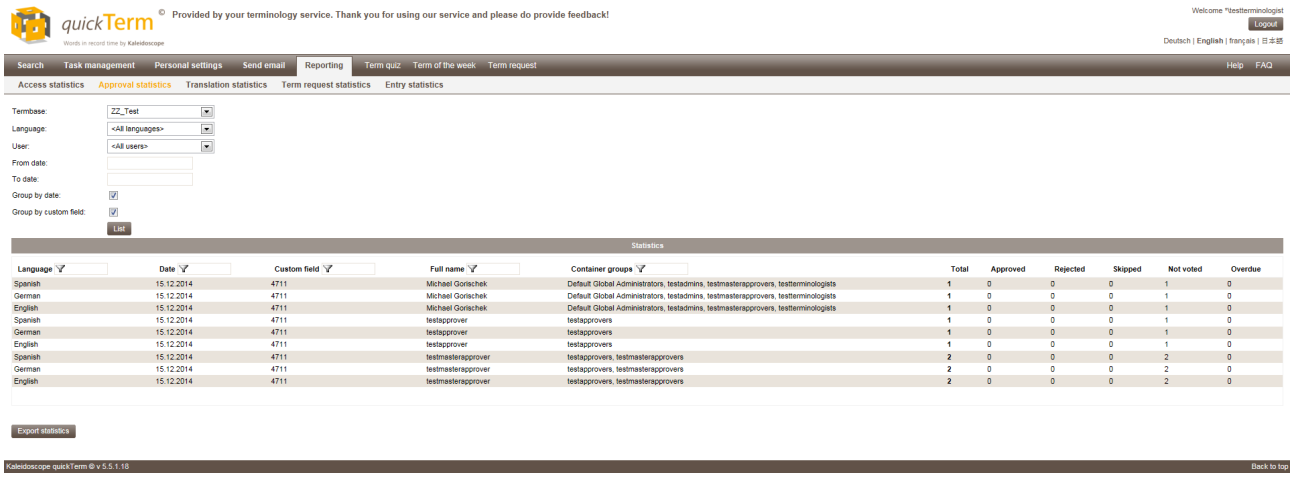
  By setting up that the report should be mailed in regular intervals. You can do this in the desktop client in the server settings on the tab "e-mail". There you can enter how often you want to automatically receive the access statistics by e-mail: on the first of the month, on the last of the month, or on one or more week days (by selecting Every) and at what time. The e-mail address for the access statistics recipient can also be defined there.

Once the report has been sent – regardless of whether it has been initiated manually or automatically – the counters for the individual statistics will be reset to zero. The total counters can be set to zero using the "Reset total counters" button. As this applies to the entire access statistics data, you will receive a warning before the counters are reset.

The Export statistics button enables you to export the access statistics to a .csv file so that you process the data separately (e.g., in Excel). In this case the data is not reset.

The "Refresh" button enables the administrator to update the data if the Access statistics screen is opened for a prolonged period of time.

## 10.8.2 Approval Statistics




*"Access statistics" in the "Reporting" tab.*

This report lets you track your approval processes. The approval statistics can only be retrieved for each termbase individually.

- "Language"

  Here you can select individual languages, "All languages" or "All languages (aggregated)". The latter means that the source and target language columns are omitted from the list.

- "User"

  Here you can select individual users, "All users" or "All users (aggregated)". The latter means that the first and last names are omitted from the list.

- "From date" / "To date"

  For restricting the time period under consideration.

- "Group by date"

If this option is selected, the date of each request will be included in the table so you can group the results by date.

- "Group by custom field"

  If this option is selected, the custom field will be included in the table so you can group the results by custom field.

- "List"

  The corresponding list will be created after clicking this button.

- "Export statistics"

  With this button you can export the term request statistics as .csv file.

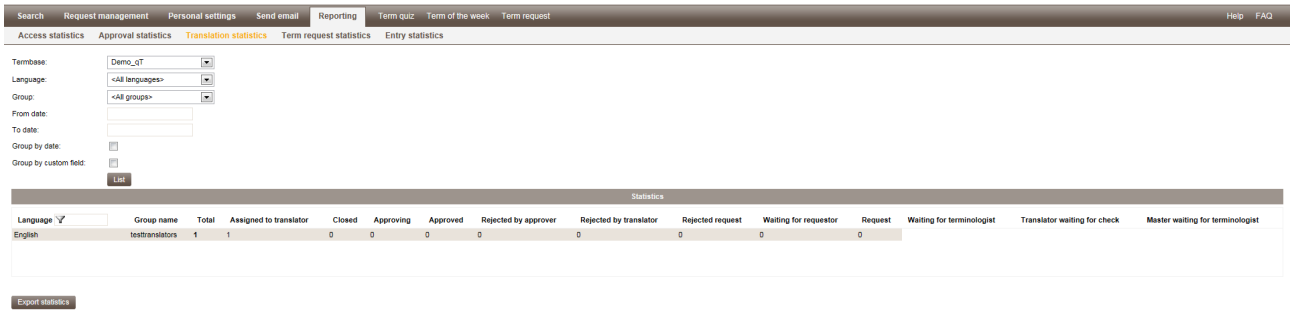
### Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

## 10.8.3 Translation Statistics




*"Translation statistics" in the "Reporting" tab.*

This report lets you track your translation tasks. The translation statistics can only be retrieved for each termbase individually.

- "Language"

  Here you can select individual languages, "All languages" or "All languages (aggregated)". The latter means that the source and target language columns are omitted from the list.

- "Group"

Groups refer to translator groups. You can select individual groups, "All groups", "All groups aggregated" or "none". Aggregated means that the "Group" column is omitted from the list.

- "From date" / "To date"

  For restricting the time period under consideration.

- "Group by date"

  If this option is selected, the date of each request will be included in the table so you can group the results by date.

- "Group by custom field"

  If this option is selected, the custom field will be included in the table so you can group the results by custom field.

- "List"

  The corresponding list will be created after clicking this button.

- "Export statistics"

  With this button you can export the term request statistics as .csv file.

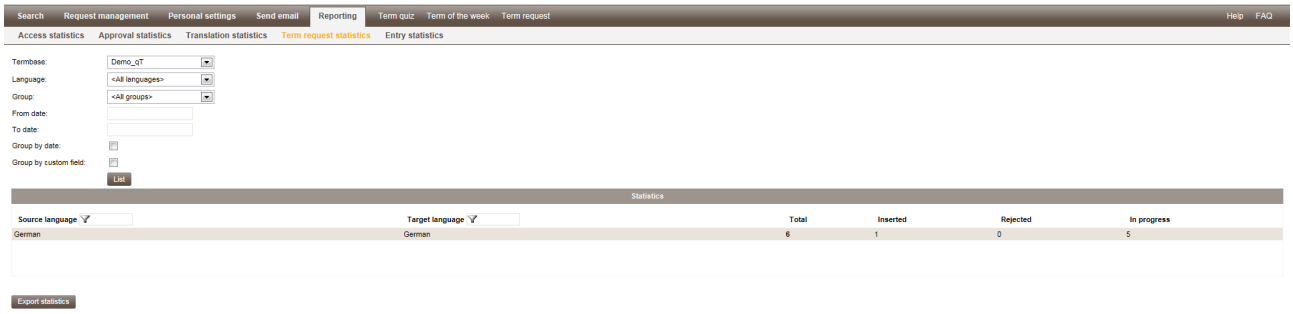
### Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

## 10.8.4 Term request statistics




*"Term request statistics" in the "Reporting" tab.*

This area shows how many term requests have been submitted within a certain time period, how many of them have become entries, how many have been rejected, and how many are still in progress.

The term request statistics can only be retrieved for each termbase individually.

- "Language"

  Here you can select individual languages, "All languages" or "All languages (aggregated)". The latter means that the source and target language columns are omitted from the list.

- "From date" / "To date"

  For restricting the time period under consideration.

- "Group by date"

  If this option is selected, the date of each request will be included in the table so you can group the results by date.

- "Group by custom field"

  If this option is selected, the custom field will be included in the table so you can group the results by custom field.

- "List"

  The corresponding list will be created after clicking this button.

- "Export statistics"

  With this button you can export the term request statistics as .csv file.

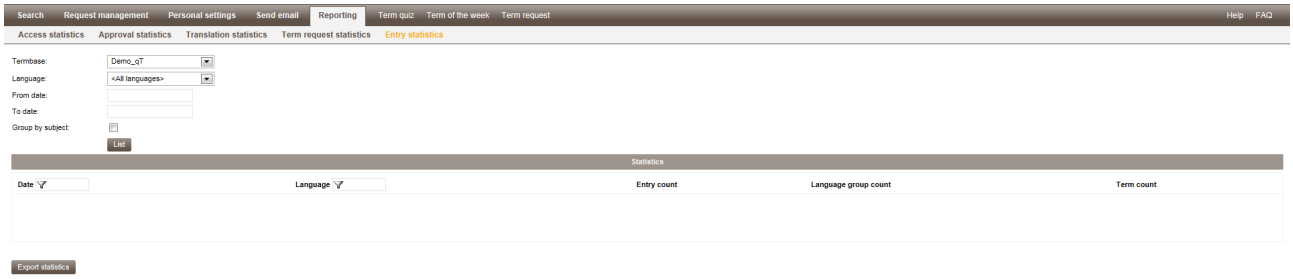
## Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

## 10.8.5 Entry statistics




*"Entry statistics" in the "Reporting" tab.*

In the Entry statistics area you can examine how the termbase has grown over various report periods. It shows the number of new entries per date range. If there are no snapshots, no figures will be shown. The entry statistics can only be retrieved for each termbase individually.

- "Language"

  Here you can select individual languages, "All languages" or "All languages (aggregated)". The latter means that the "Language" column is omitted from the list.

- "From date/To date"

  For restricting the time period under consideration.

- "Group by subject"

  If this option is selected, the custom field will be included in the table so you can group the results by custom field.

- "List"

  The corresponding list will be created after clicking this button.

- "Export statistics"

  With this button you can export the entry statistics as .csv file.

### Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

# 11 Approver: Special Functions

As the approver, new or changed terms are assigned to you to approve in the quickTerm Workflow by the terminologist. You are responsible for voting for or rejecting these entries.

Approvers are always members of an approval group, which means they have to decide on the new entries jointly with their colleagues. There are two types of approval groups:

- First-Wins

  In a "First wins" group only one member of the group has to vote. Their vote is cast for the group as a whole. That means that in your assigned task lists you only see tasks which have not yet been answered by any of your group members.

- Voting Group

  Voting groups have one of two voting procedures:

  – The minimum agreement procedure requires a specific number of users in a group to approve an entry in order for the group's approval to have been given.

  – The minimum votes procedure dictates that a certain number of total votes has to be cast for each term before a decision (agree or reject) can be reached. Abstentions are not counted.

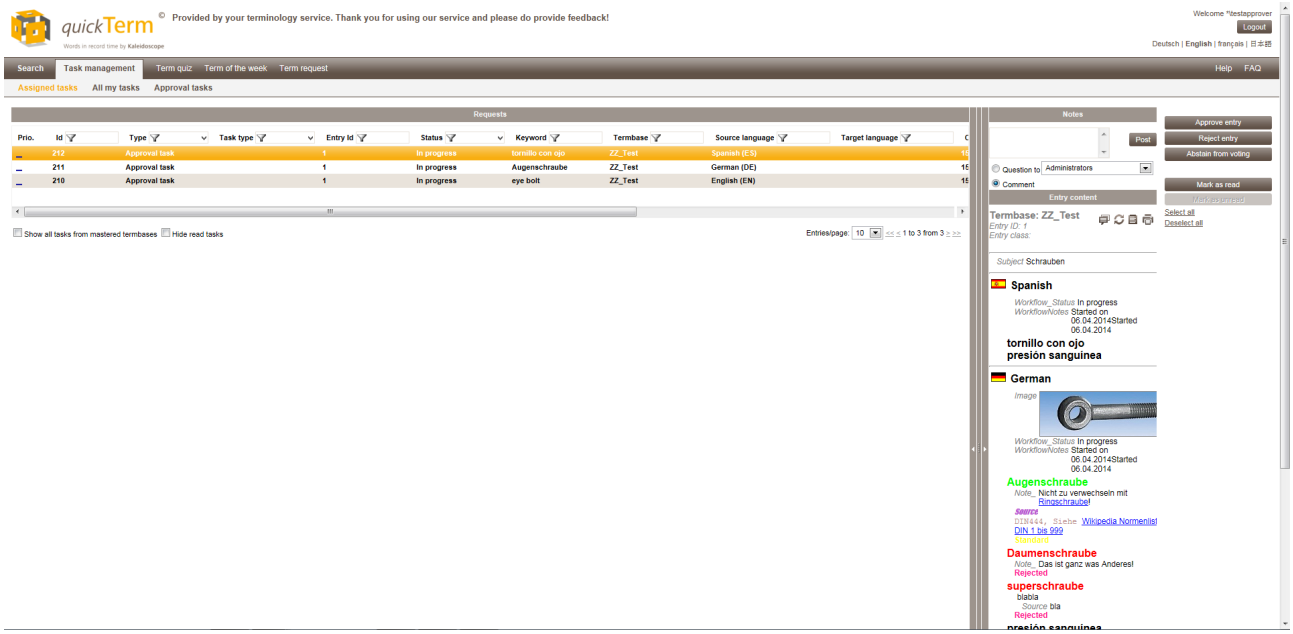
The administrator specifies whether an approval group is to use the first wins or voting procedure to approve entries under Approval settings in User management.

Approvers may also have edit tasks assigned to them in the role of specialist. If an action is required from approvers, they can find this information on the "Assigned tasks" tab. The "All my tasks" tab shows all tasks for the approver, including those in which they are involved but do not yet need to action. This includes their own feedback, edit and translation tasks, and term requests.

## 11.1 Approving a Translation Suggestion

Switch to your Request management screen. Here you will see all tasks that are currently assigned to you. You can find a detailed list of approval tasks on the Approval tasks tab. These are the same tasks, but shown in more detail.

Click on a row to look at the respective task. Next to the list you can then display the entry itself as well as any comments that might have been added to it.




*Dialog "Approval tasks"*

## "Read" and "unread" tasks

In all task lists, the buttons "Mark as read" and "Mark as unread" are available. Depending on the current task, one of these is always greyed out. Unread tasks are always displayed in bold, like in Outlook. By clicking the respective button, you can change the state.

A task is automatically changed to "read" when you select it in the list. With the "Hide read tasks" option you can hide the read tasks and only display the unread ones.

## Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

**"Hide closed tasks" option**

These tasks include approved and rejected tasks.

## Filtering the list of tasks

You can also see the following information on the Approval tasks tab:

- A checkmark, cross or minus symbol shows you which groups have already approved (green checkmark) or rejected (red crossed out box) which entries, and those that have abstained from voting.
- You can "expand" an approval request by clicking on the *plus symbol*. This shows you all other colleagues in the approval group and their votes. You can thus check what your colleagues voted and who voted for or against the entry. The first checkbox in an expanded group, or the only checkbox in a collapsed group shows you the status of the entire group. For instance, if a set number of voters in a voting approval group have approved or rejected an entry, it will get a green or a red checkmark.
- When you select the "Expand all" option at the bottom of the screen this is equivalent to checking every plus symbol for every approval task. When you remove the checkmark, all the approval processes will be collapsed.
- By clicking on "Show time stamp" underneath the list, you can display the actual time and date when each approver cast his vote.
- You can also click directly in the various checkboxes next to your own approver user in order to approve an entry. Each click changes the approval state to the next possible state. To avoid accidental changes, you must still click on the small floppy disk icon on the far left to save the change.

## Approving an Entry

On the right-hand side of the screen, you will see the details relating to the highlighted entry. You can also see comments from your colleagues at the bottom.

You can add new comments or make subsequent changes to your own comments. The terminologist can also see these comments and, if applicable, respond to information requests. You can also send targeted questions to individual groups.

You can copy the comment text in quickTerm Client (place the cursor in the comments area and right-click).

This is how you approve or reject an entry:

a) Select the entry from the list on the left.

b) Click on "Approve entry" to approve an entry
   - OR -
   Click on "Reject entry" to reject it. Particularly in the latter case, you also need to indicate the reason for rejecting the entry, so your colleagues or the terminologist can adapt it accordingly.
   - OR -
   Click on "Abstain from voting" if you do not or cannot approve or reject the entry. When you abstain from voting, you should also leave a comment for the terminologist to understand why you did that.

The entry is now approved, not approved or edited. If you have not approved the entry and your colleagues are in agreement with you, the terminologist will revise the entry and resubmit it to you for approval.

# 12 Main Approver: Special Functions

In quickTerm one main approver is assigned for each language. This user has two additional functions:

### Main approver for source-language approvals

In the case of source-language approvals, the terminologist responsible can initiate a cascaded approval process. This means that firstly all "normal" approvers must cast their votes, then the main approver consolidates the votes and sends a summary to the terminologist.

For this reason, the main approver must always wait until all his colleagues have cast their votes where the cascaded approval process is concerned. For flat approvals, the main approver is a "normal" approver, just like the other approvers.

The functionalities available are identical to those involved in normal approval. For more details, see Approver: Special Functions [→ 114]

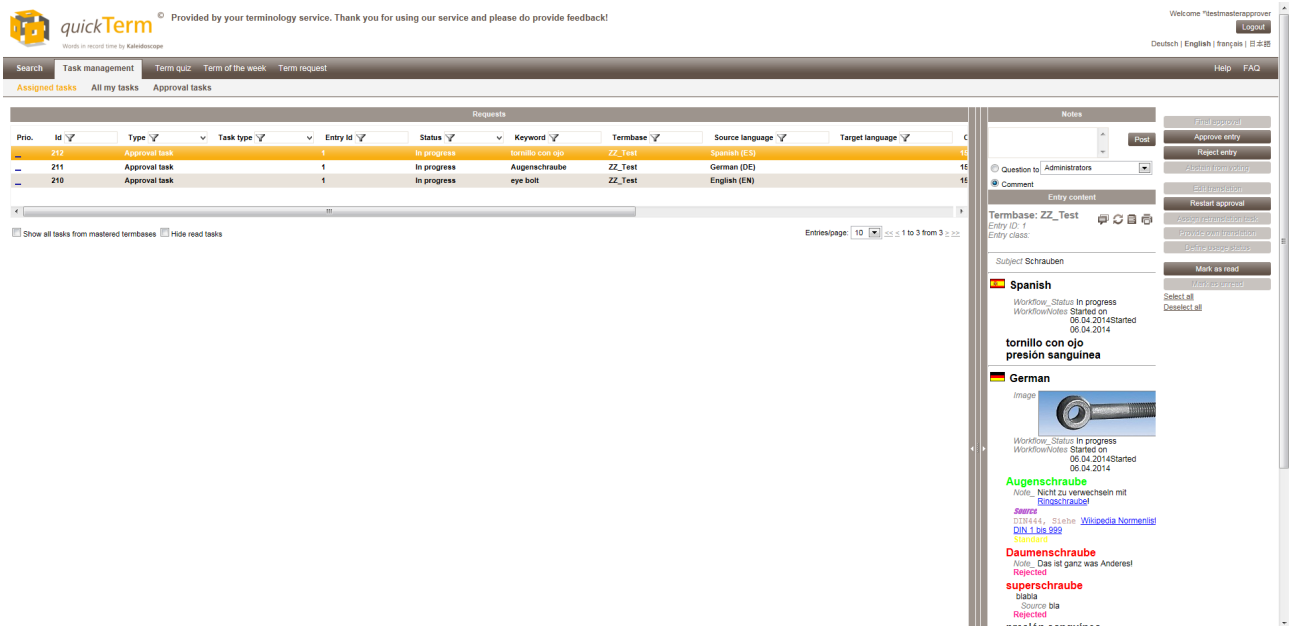
### Main approver for target-language approvals

The terminologist is not involved in target-language approvals initiated by the translator, as in most cases he does not know the language. As the main approver you therefore have the final say. You can do the following with a translation suggestion:

- Accept
- Edit and then accept
- Reject and request a new suggestion from the translator
- Reject and provide the correct translation yourself

## 12.1 Main Approval for Translation Suggestions

Switch to your Request management screen.




*Overview for main approver in quickTerm Web*

You can limit the scope of the approval tasks list as follows:

- By checking the "Hide already closed tasks" option
- By filtering; if filtering according to status, it is also possible to select multiple values from "Rejected", "Closed", "All approved", "In progress" and "None".

## 12.2 Granting Final Approval for an Entry

To grant final approval for an entry:

a) Select the entry from the list on the left.

b) To the right of the vertical divider bar you will find details enabling you to check the entry and view the notes entered by your colleagues.

c) Click on "Final approval" to approve the entry.

⇨ The "Term usage status" dialog box appears.

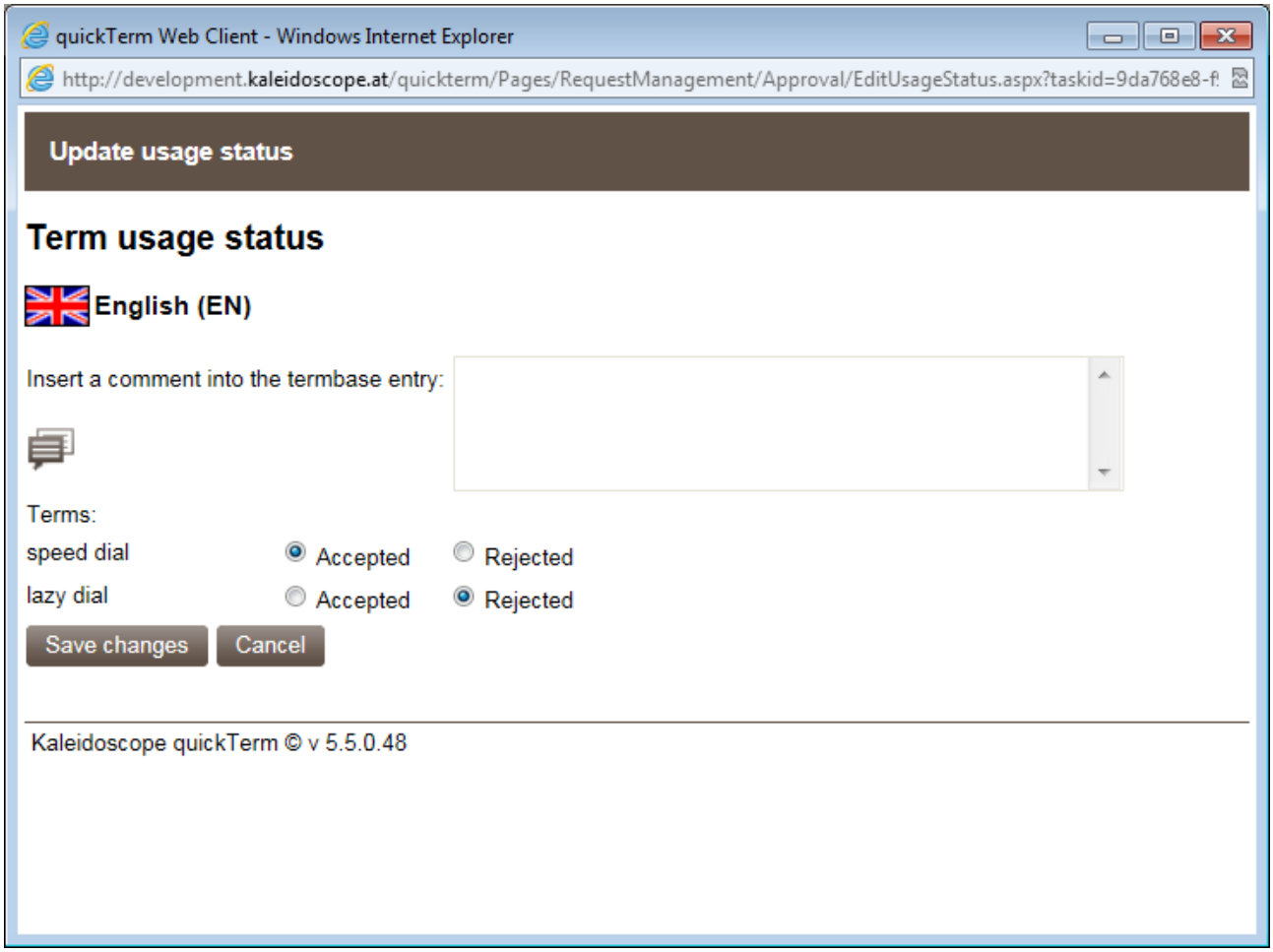
d) If you wish, you can enter a comment to be stored in the termbase. By clicking on the small icon, you can also copy the comments made during the approval process to the field before editing them.

e) Select under each term whether they are accepted or rejected terms.

⇨ This information is entered in the termbase.

f) Click on "Save changes".

⇨ The entry is granted final approval and closed in your request management.




*"Term usage status" dialog*

## 12.3 Assign retranslation task

To reject a translation suggestion and request a new suggestion:

a) Select the entry from the list.

b) Click on "Assign retranslation task".

⇨ The "Assign retranslation task" dialog box appears.

a) Select the relevant title.

b) Select a translator group for each language, and also a main translator group if required.

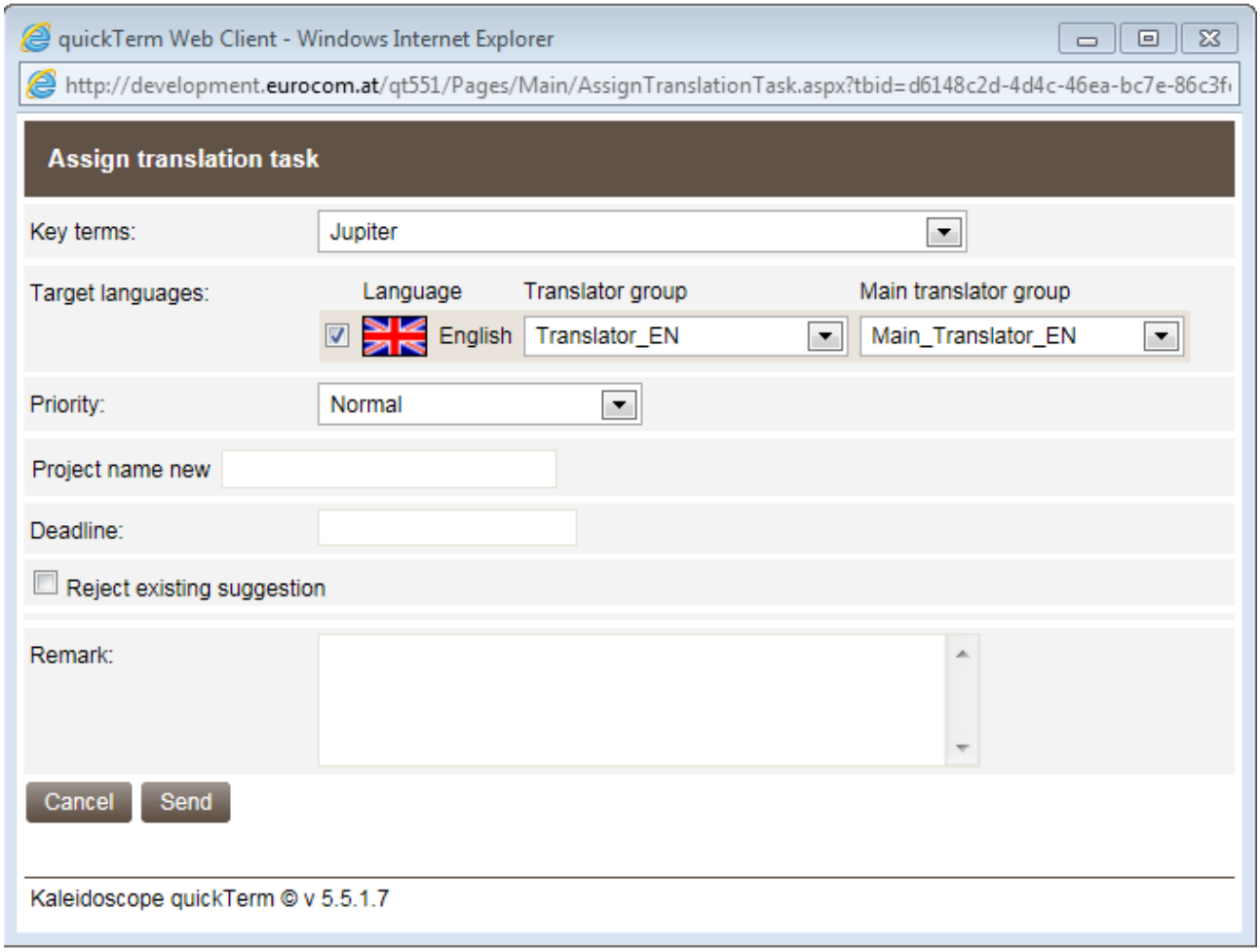
c) Edit the priority, the custom field and the deadline, if required.

d) Select whether the usage info for the previous translation should be set to "rejected".

e) Add a remark for the translator.

f) Click on "Send".

⇨ The translator will now receive a new translation task. The current approval task will be closed. As soon as the translator has made a new suggestion, you will receive a new approval task.




*"Assign translation task" dialog*

## 12.4 Providing Your Own Translation

**Caution**

This function is only available if it is enabled in the user group configuration (see General Group Settings chapter in quickTerm configuration).

To reject a translation suggestion and enter your own translation in the termbase:

a) Select the entry from the list on the left.

b) Click "Provide own translation" to enter your own translation.

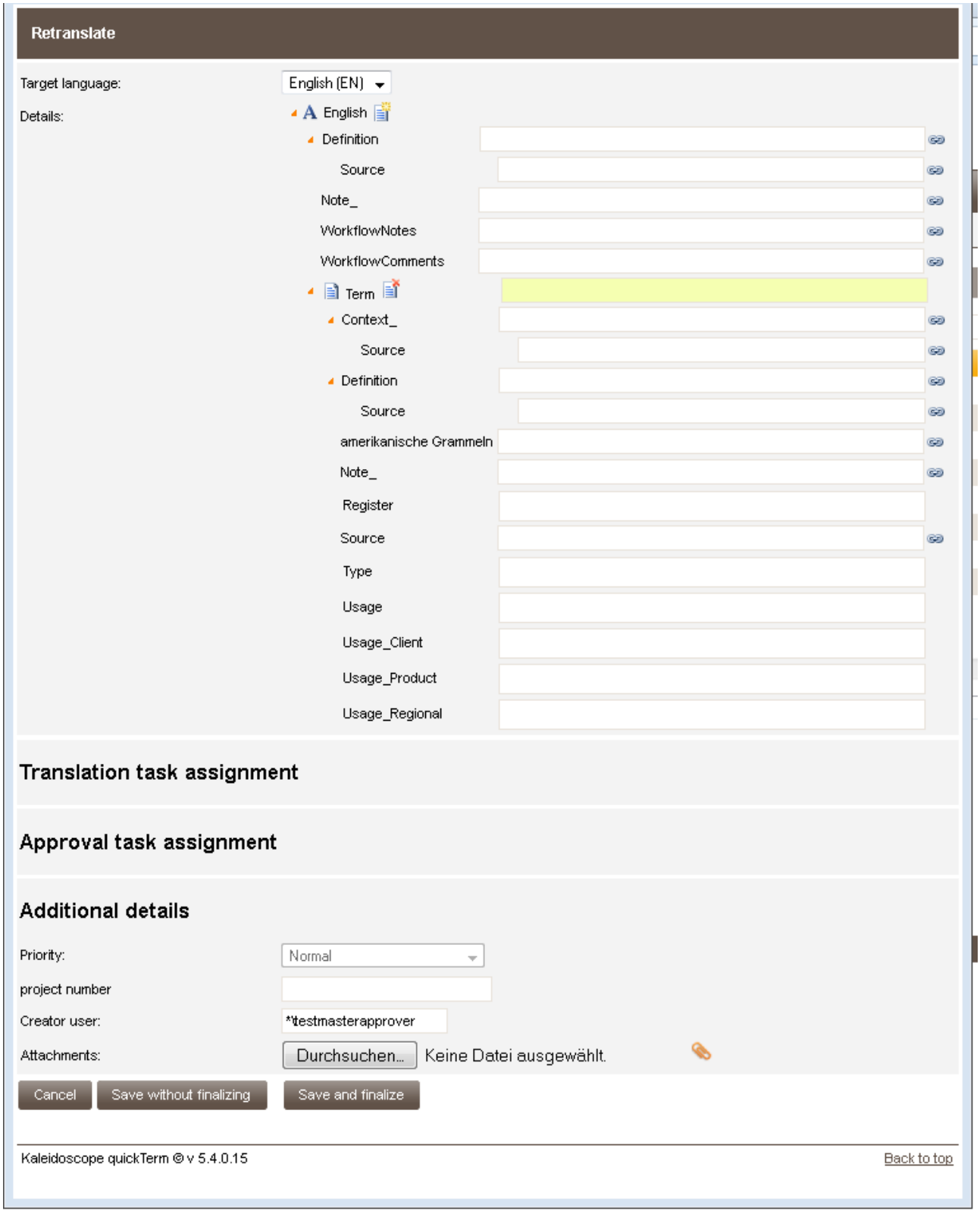
⇨ The "Edit translation data" dialog box appears.

c) Enter the desired translation for the entry, including as much of the additional information as you wish.

d) Click on "Save without finalizing" if you do not want to approve your own translation yet for some reason (this means that apart from the key term, neither the relevant approval task nor the term usage status will be changed), or "Save and finalize". If you click the latter, final approval is granted and the "Term usage status" dialog box will then appear.

⇨ The correct translation will be automatically entered into the termbase by default.

The current approval task will be closed.




*"Retranslate" dialog*

## 12.5 Editing (and Approving) a Translation

This is performed in the same way as "Provide own translation". The only difference is that here you can edit a translation that already exists instead of rejecting it and entering a new translation. Apart from that, the dialog box and buttons are identical.

## 12.6 Restarting Approval

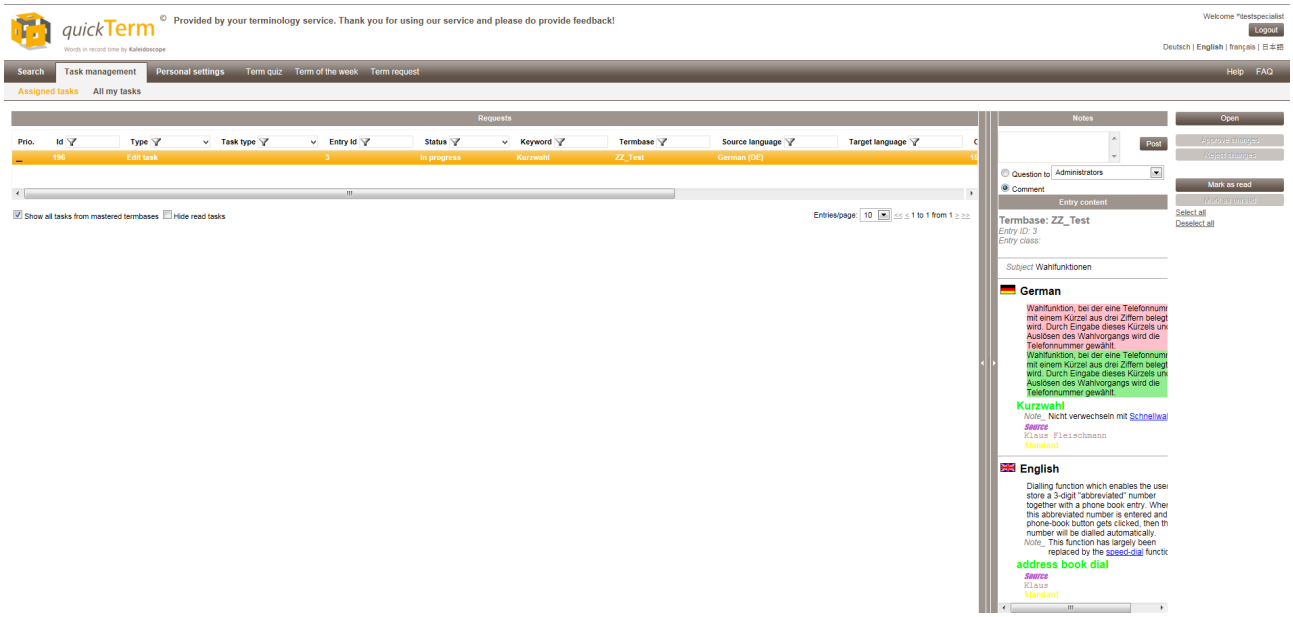
With this function the terminologist or main approver can restart an approval task from the beginning. This function will start a new approval task and set the status of the previous one to "restarted". In addition to a message to the approver, you can also enter the priority and the (new) deadline here in the same way as for other approval tasks.

# 13 Specialist: Special Functions

As a specialist, an entry or a term request can be assigned to you by the terminologist in the quickTerm Workflow in order for you to provide further information about the term. The terminologist selects the additional fields you should complete on assignment.

You can collaborate with the other specialists via the comments function, enter information and then approve your suggestion.

## 13.1 Editing a Task




*Request management, "Assigned tasks" tab*

Switch to the Request management screen. In the list of assigned tasks, you can filter by edit tasks.

The list shows the open edit tasks. These tasks and any of the tasks you have already completed are shown in the "All my tasks" tab.

On the right-hand side of the screen, you will see the details relating to the highlighted entry. The fields that you need to edit are highlighted in green and red in this area. Red signifies the data before editing, in case you have the task of editing content. Green signifies the current status of your edit. If there is no content in the red fields, then these are currently blank in the termbase or term request. If there is no content in the green fields, then you (or your colleagues) have not yet entered any information.

## "Read" and "unread" tasks

In all task lists, the buttons "Mark as read" and "Mark as unread" are available. Depending on the current task, one of these is always greyed out. Unread tasks are always displayed in bold, like in Outlook. By clicking the respective button, you can change the state.

A task is automatically changed to "read" when you select it in the list. With the "Hide read tasks" option you can hide the read tasks and only display the unread ones.

## Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

**"Hide closed tasks" option**

These tasks include approved and rejected tasks.

## Editing a task

To edit the task proceed as follows:

a) Select the task from the list.

b) Click on "Open" to open the details about the edit task.

⇨ The "Edit task" dialog box appears.

c) Enter additional information in the fields displayed in red. The other fields contain information that either the terminologist has already added to the termbase or the requestor has entered in the term request.

You can add new terms to an entry with the icon.

You can delete terms from an entry with the icon.

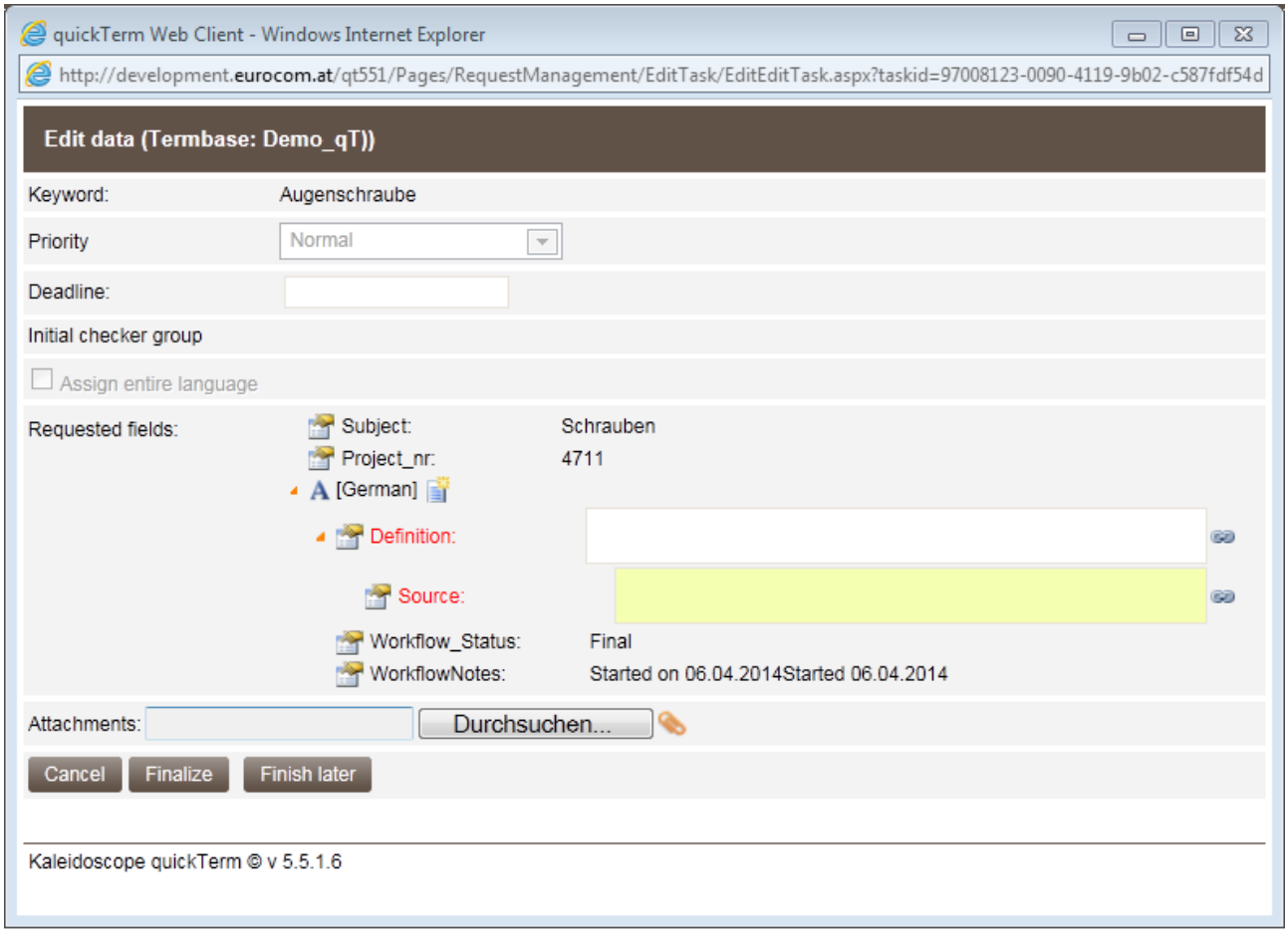
You can delete the content of a field with the icon.
If you want to close the task later, you can do so by clicking "Finish later".

d) If you want to close the task later, you can do so by clicking "Finish later". Otherwise, click on "Finalize".

⇨ The information you have entered is saved and shown in the overview. Your approval is automatically granted for this entry.

**Changing edit tasks that have already been approved**

If the edit task should be assigned to several groups and some groups have already voted, these votes are deleted and the edit task is presented again for approval.




*"Edit task" dialog*

## Voting on changes made by other users

**Voting procedure**

The voting procedure to be used within a group (e.g., First win) is defined for the individual groups during configuration. If a voting procedure is not defined, the buttons described here will not be available.

To approve or reject the additional information provided by your colleagues: Select the relevant entry from the list and then click the desired button:

- "Approve changes"

  By clicking this button you are accepting the changes.

- "Reject change"

  By clicking this button you are rejecting the changes. In this case you should also enter a comment or provide additional information.

- "Abstain from voting"

  If you "do not mind", you can register this by clicking this button.

Your approval, rejection or abstention from voting will be saved, and the task will be hidden from the "Assigned tasks" list.

**Voting only possible after edit**

You can only vote on an edit task once information was added to the entry.

# 14 Translator: Special Functions

As a translator, you are responsible for the linguistic development of the termbase together with the target-language approvers. You can perform this function in three ways using quickTerm:

- In the quickTerm search dialog, you can request multilingual terms. As this is the standard term request function, it is not explained in detail here. For more details see Termantrag.
- In the quickTerm search dialog, you can suggest an initial or additional translation for existing entries.
- In your Request management you can process the translation tasks assigned to you.

## 14.1 Providing Translation Suggestions

As a translator, you can suggest one or several (new) foreign-language equivalent(s) for an existing entry. In quickTerm this is known as a Translation suggestion.

To provide a translation suggestion:

a) Search for the entry in quickTerm that you want to provide a translation suggestion for.

b) Click on the *Suggest translation* button.

⇨ The *Suggest translation* dialog box appears.

c) Select the desired target language from the list. The list only contains the languages to which you have access rights and for which there is not a foreign-language equivalent. Depending on the configuration, it is either permitted or forbidden for you to provide translation suggestions for entries that already have a translation. In this case a warning message appears if the foreign-language equivalent has already been approved; select *OK*, then you will receive a message confirming that the approval process has been restarted.

d) Enter the details of the translation suggestion. If you want to suggest more than one term, use the *Add new term* button (e.g. for synonyms).

e) Define the priority and edit the custom field (auto fill or enter manually), where applicable.

f) If you want to initiate the approval process for the approver responsible, click on the *Start approval task* checkbox. This option is not available if your language is defined as one that absolutely must be approved or does not need approval. In the event of the former, your suggestion will be automatically sent for approval, or for the latter, it will be granted approval immediately. Translation suggestions that are sent for approval are always cascaded, as the main approver is also the final approver.

g) Click on the paper clip icon if you want to attach a file.

h) Under the task assignment, define the *Assigned main translator group*. If you select <*none*> here, you can then Save and finalize the translation suggestion. If you select a main translator group, instead of the Save and finalize button the *Send to main* button appears. By clicking on it, the translation suggestion is forwarded to the main translator group. The buttons *Cancel* and *Save without finalizing* are also available for you to select.

i) Clicking on *Save and finalize* initiates the following:

⇨ quickTerm enters your translation suggestion in the termbase.

⇨ quickTerm starts the approval process, if required.

If you enter a translation suggestion for an entry that was also a translation request from the terminologist, you will be notified of this and can thus close the translation request at the same time.

**Approvers for target languages**

Target-language approval only works if at least one approver group is defined for each language. quickTerm will therefore notify you of an error, both in group configuration and when sending an approval task, if an approver group has not been assigned. You can forward this error to the administrator.

## 14.2 Editing Translation Tasks

The terminologist can assign individual entries to you for "translation". You will be notified by e-mail and have an overview of these requests in your request management where you can also process them:

Switch to your Request management screen.

This screen contains two tabs:

- "Assigned tasks"

This tab contains all the translation tasks assigned to you and the translation suggestions that you can process.

- "All my tasks"

  This tab contains the tasks assigned to you and any other tasks that are relevant to you, even if there is no action required of you at the moment. For example, these could be the term requests you have submitted as a translator You can track the status of approvals here.

## "Read" and "unread" tasks

In all task lists, the buttons "Mark as read" and "Mark as unread" are available. Depending on the current task, one of these is always greyed out. Unread tasks are always displayed in bold, like in Outlook. By clicking the respective button, you can change the state.

A task is automatically changed to "read" when you select it in the list. With the "Hide read tasks" option you can hide the read tasks and only display the unread ones.

## Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

**"Hide closed tasks" option**

These tasks include approved and rejected tasks.

## Editing a translation task

To edit a translation task:

a) Highlight the desired translation task in the list.

b) On the right you will see the entry to be translated.

c) If you do not want to *Reject* the *task*, *Ask for information* (only enabled if the requestor is not an anonymous end user), or *respond*, click on *Open*.

⇨ The *Edit translation data* dialog box appears.

d) Enter the corresponding details for the translation.

e) Click on the paper clip icon if you want to attach a file.

f) Edit the custom field (autofill or enter manually), where applicable.

You now have several options to branch into other workflows:

### Assign to proofreader

a) If you are working with a colleague who is going to proofread your translation suggestions, click on "Save without finalizing". The status will change to "Initial translation supplied". The task is also marked as "read". This enables the first translator to hide the task using both the "read" view and the status filter. The second translator can set up a status filter so that only the entries with the status "Initial translation provided" are shown.

⇨ Your colleague can now log in, edit your data and then also click on "Save without finalizing".

### Assign to main translator

a) If you have defined a main translator and you would like to delegate the translation suggestion to a main translator before approval, click on "Send to main user".

⇨ The main translator can now log in and edit, then save the translation.

### Assign to approver

a) If you would like to have the translation approved, click on the "Assign approval task" checkbox. This option is not available if your language is defined as one that absolutely must be approved or does not need approval. In the event of the former, your suggestion will be automatically sent for approval, or for the latter, it will be granted approval immediately. Translation suggestions that are sent for approval are always cascaded, as the main approver is also the final approver.

b) Click on "Save and finalize".

⇨ quickTerm enters your translation suggestion in the termbase.

⇨ quickTerm starts the approval process, if required.

⇨ quickTerm closes the translation task.

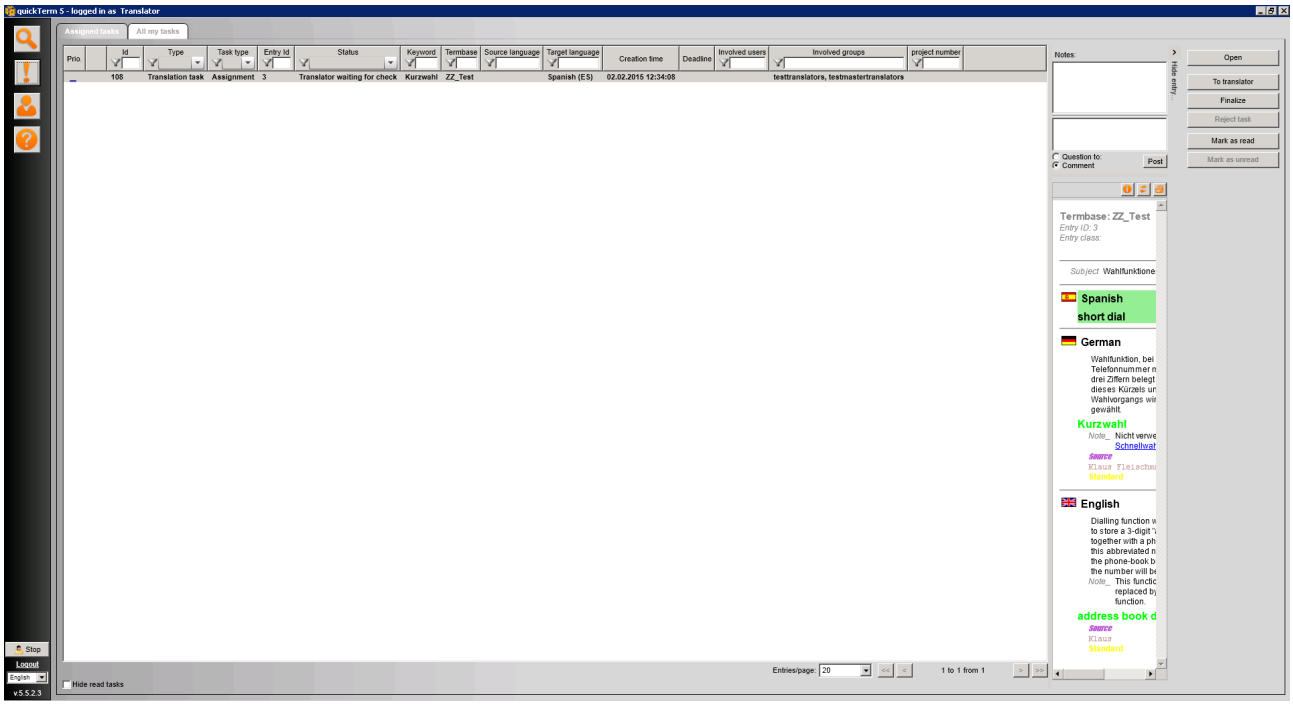
**Approvers for target languages**

Target-language approval only works if at least one approver group is defined for each language. quickTerm will therefore notify you of an error, both in group configuration and when sending an approval task, if an approver group has not been assigned. You can forward this error to the administrator.

## 14.3 Edit Translation Suggestions

a) Do not edit a translation suggestion after closing it. You can no longer add these changes to the termbase. If you want to make changes, submit a change request.

# 15 Main Translator: Special Functions




*Task list main translator*

The main translator has two additional functions that distinguish him from the translator:

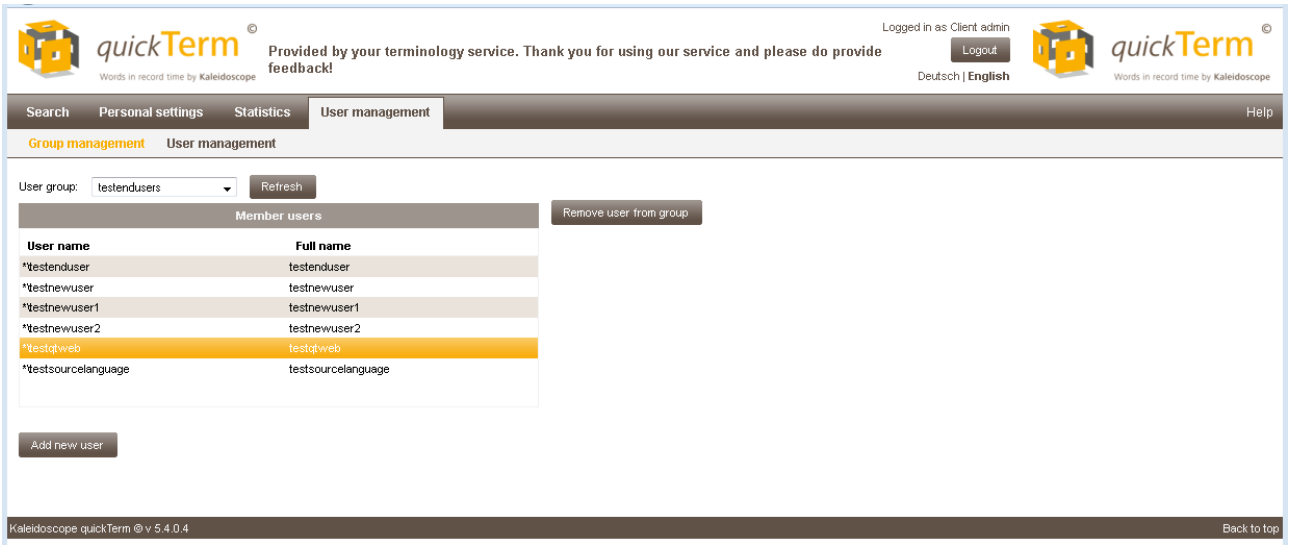
- If the translator has already sent translation data to the main translator ("Translator waiting for check" status), the translator cannot reject the entry. It is only possible to do so for requests or suggestions that the translator has not yet forwarded.
- During review, if the main translator does not grant approval to the translator for his entry, he can send the translation data back to the translator by clicking on the "Assign to translators" button. The status will be reset to "Assigned to translator". The main translator can also pass a comment along to the translator.

# 16 (Client) Administrator: Special Functions

## 16.1 User Management

In quickTerm Web, administrators have a subset of the functionalities available in the Client version of the program. In User management they can create new users and add them to existing groups. It is naturally also possible to change which members belong to which groups and delete users.

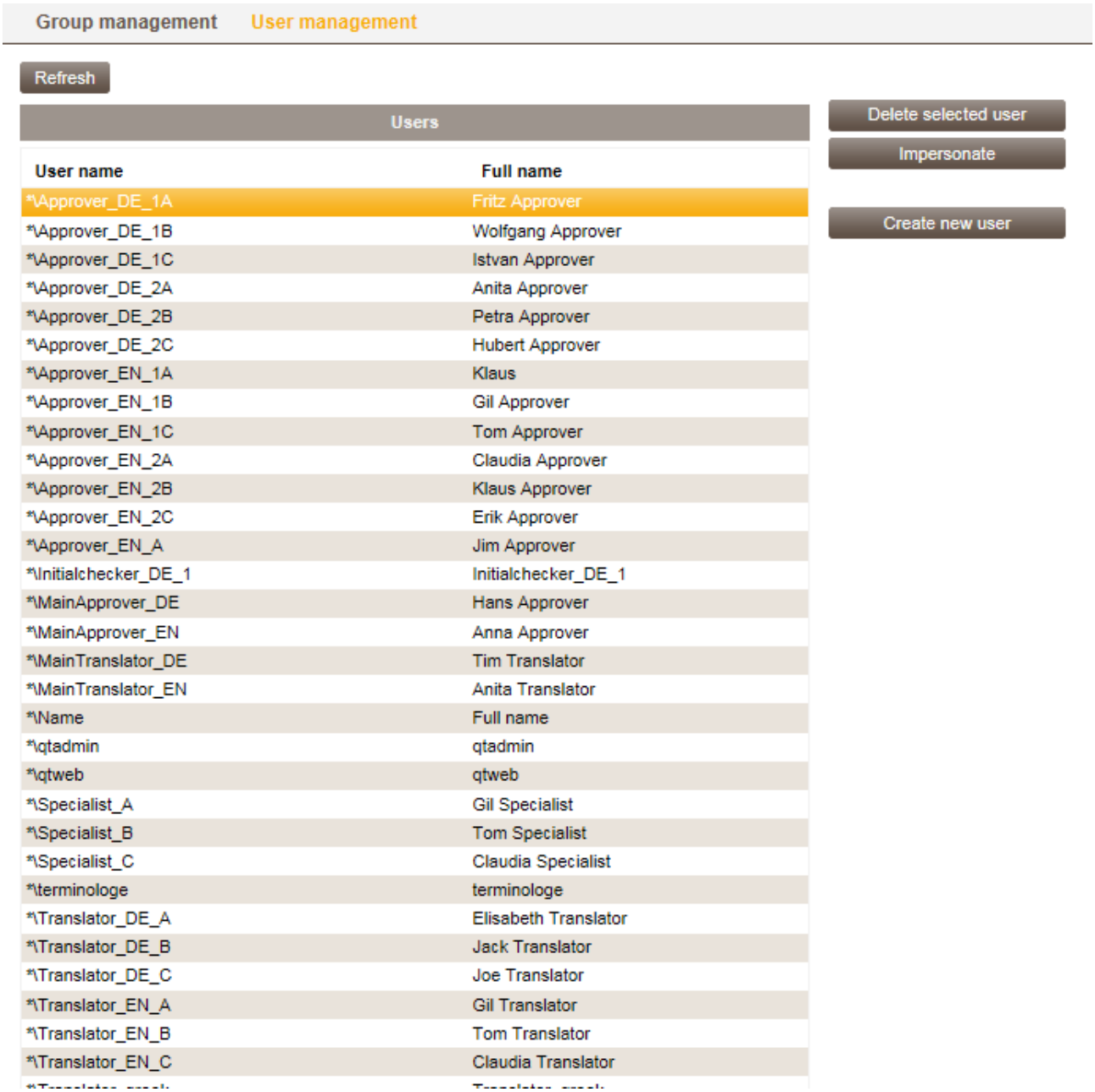
### Group management




*Group management*

Here you can change the members of existing user groups, and either add a new user or remove an existing user from the group.

## User management




*User management*

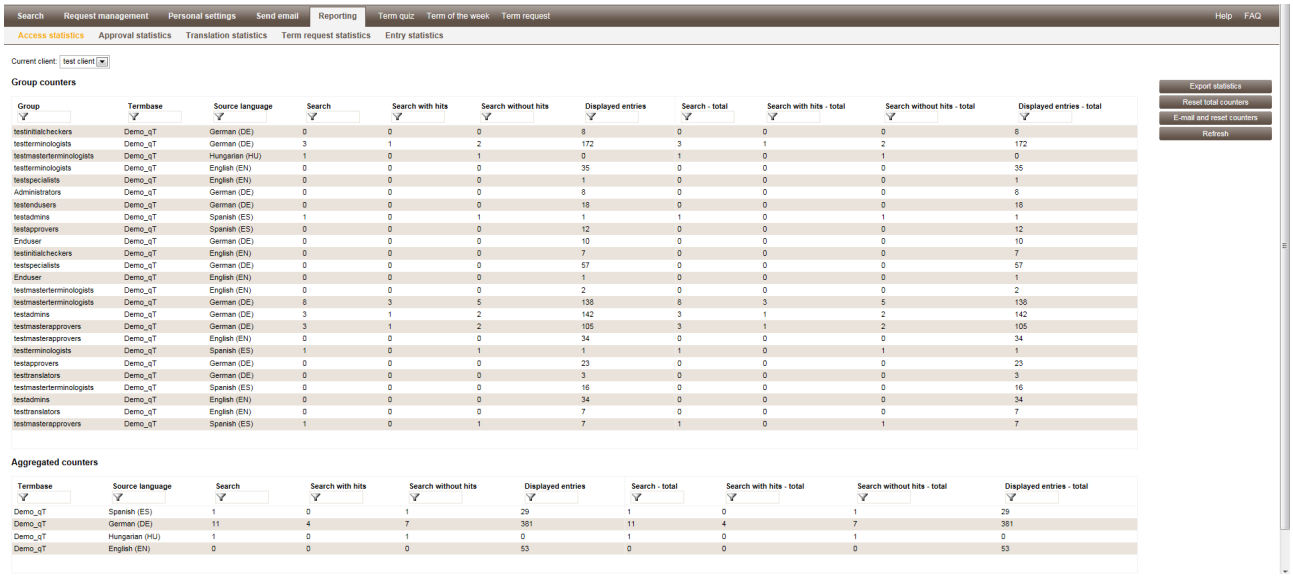
Here you can create new users, deleted the selected users, or carry out user impersonation.

For more details on these functionalities see Creating Users and User Groups.

## 16.2 Reporting

Client administrators and terminologists will find the following reporting options in quickTerm Web: Access, approval, translation, term request, and entry statistics.

### 16.2.1 Access statistics




*Can be found in the tab "Access statistics" in the "Reporting" tab.*

In the access statistics area you can view access data for the termbase as recorded by quickTerm.

This report is horizontally divided into two areas:

- "Group counters"

  The most granular way of grouping access data by user group / termbase / source language.

- "Aggregated counters"

  A less granular way of grouping access data by termbase and language.

User-level access statistics are not available due to data privacy law.

Vertically, both reports are divided into two areas separated by a vertical line.

- The first four columns before the divider show the access statistics for the most recent report period. The report period is always reset when the statistics are automatically or manually reset.
- The last four columns comprise the cumulative total access statistics.

## Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

A report can be initiated in two ways:

- Manually

  Via the "E-mail and reset counters" button

- Automatically

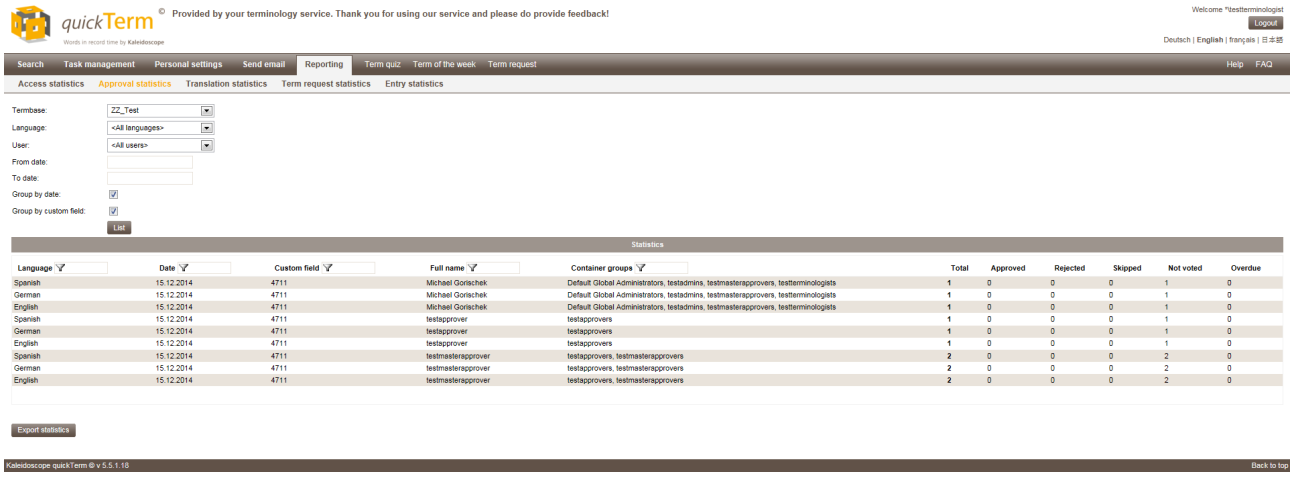
  By setting up that the report should be mailed in regular intervals. You can do this in the desktop client in the server settings on the tab "e-mail". There you can enter how often you want to automatically receive the access statistics by e-mail: on the first of the month, on the last of the month, or on one or more week days (by selecting Every) and at what time. The e-mail address for the access statistics recipient can also be defined there.

Once the report has been sent – regardless of whether it has been initiated manually or automatically – the counters for the individual statistics will be reset to zero. The total counters can be set to zero using the "Reset total counters" button. As this applies to the entire access statistics data, you will receive a warning before the counters are reset.

The Export statistics button enables you to export the access statistics to a .csv file so that you process the data separately (e.g., in Excel). In this case the data is not reset.

The "Refresh" button enables the administrator to update the data if the Access statistics screen is opened for a prolonged period of time.

## 16.2.2 Approval Statistics




*"Access statistics" in the "Reporting" tab.*

This report lets you track your approval processes. The approval statistics can only be retrieved for each termbase individually.

- "Language"

  Here you can select individual languages, "All languages" or "All languages (aggregated)". The latter means that the source and target language columns are omitted from the list.

- "User"

  Here you can select individual users, "All users" or "All users (aggregated)". The latter means that the first and last names are omitted from the list.

- "From date" / "To date"

  For restricting the time period under consideration.

- "Group by date"

  If this option is selected, the date of each request will be included in the table so you can group the results by date.

- "Group by custom field"

  If this option is selected, the custom field will be included in the table so you can group the results by custom field.

- "List"

  The corresponding list will be created after clicking this button.

- "Export statistics"

  With this button you can export the term request statistics as .csv file.

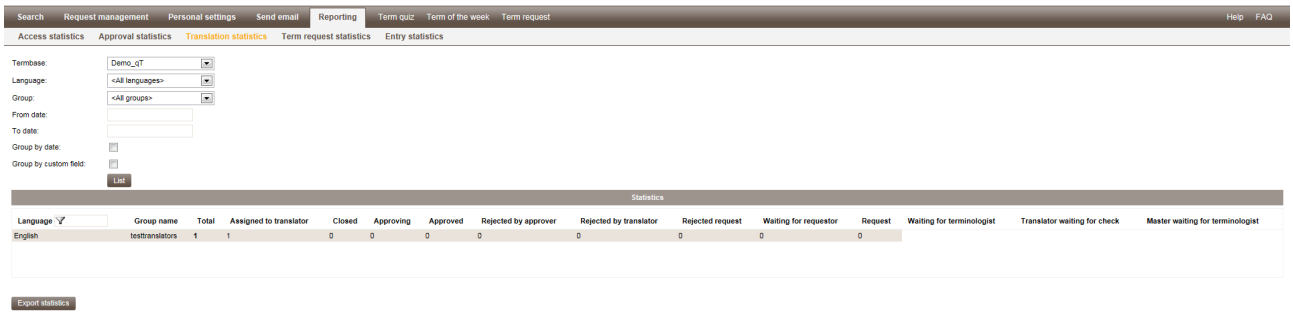
### Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

## 16.2.3 Translation Statistics




*"Translation statistics" in the "Reporting" tab.*

This report lets you track your translation tasks. The translation statistics can only be retrieved for each termbase individually.

- "Language"

  Here you can select individual languages, "All languages" or "All languages (aggregated)". The latter means that the source and target language columns are omitted from the list.

- "Group"

  Groups refer to translator groups. You can select individual groups, "All groups", "All groups aggregated" or "none". Aggregated means that the "Group" column is omitted from the list.

- "From date" / "To date"

  For restricting the time period under consideration.

- "Group by date"

  If this option is selected, the date of each request will be included in the table so you can group the results by date.

- "Group by custom field"

If this option is selected, the custom field will be included in the table so you can group the results by custom field.

- "List"

  The corresponding list will be created after clicking this button.

- "Export statistics"

  With this button you can export the term request statistics as .csv file.

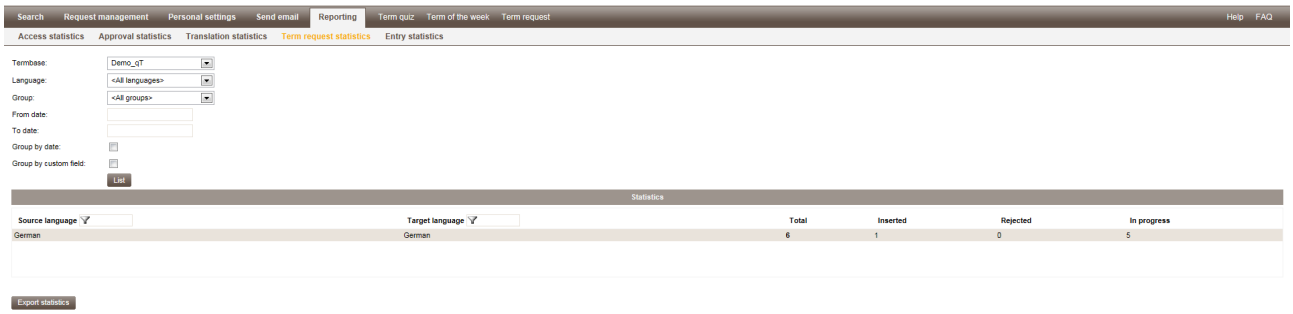
### Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

## 16.2.4 Term request statistics




*"Term request statistics" in the "Reporting" tab.*

This area shows how many term requests have been submitted within a certain time period, how many of them have become entries, how many have been rejected, and how many are still in progress.

The term request statistics can only be retrieved for each termbase individually.

- "Language"

  Here you can select individual languages, "All languages" or "All languages (aggregated)". The latter means that the source and target language columns are omitted from the list.

- "From date" / "To date"

For restricting the time period under consideration.

- "Group by date"

  If this option is selected, the date of each request will be included in the table so you can group the results by date.

- "Group by custom field"

  If this option is selected, the custom field will be included in the table so you can group the results by custom field.

- "List"

  The corresponding list will be created after clicking this button.

- "Export statistics"

  With this button you can export the term request statistics as .csv file.

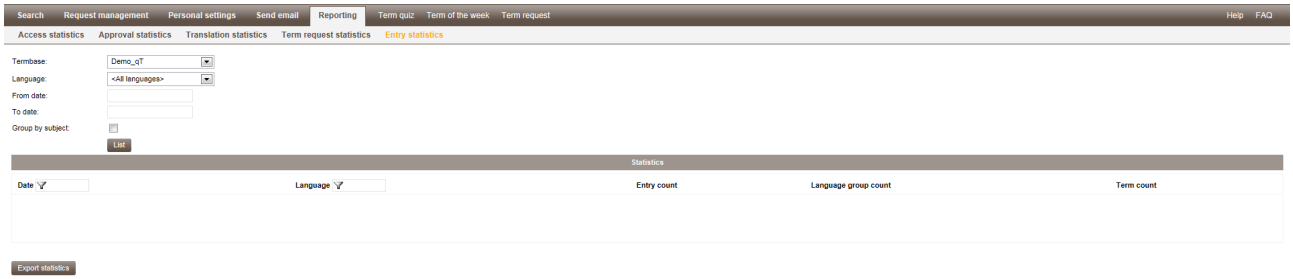
### Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

## 16.2.5 Entry statistics




*"Entry statistics" in the "Reporting" tab.*

In the Entry statistics area you can examine how the termbase has grown over various report periods. It shows the number of new entries per date range. If there are no snapshots, no figures will be shown. The entry statistics can only be retrieved for each termbase individually.

- "Language"

Here you can select individual languages, "All languages" or "All languages (aggregated)". The latter means that the "Language" column is omitted from the list.

- "From date/To date"

  For restricting the time period under consideration.

- "Group by subject"

  If this option is selected, the custom field will be included in the table so you can group the results by custom field.

- "List"

  The corresponding list will be created after clicking this button.

- "Export statistics"

  With this button you can export the entry statistics as .csv file.

## Sorting and filtering lists

The overview list can be sorted by clicking on the header of the respective column. This setting will be saved for the next time you open the list.

The list can also be filtered by typing a few letters of the desired content into the header. The list will then only display those entries that contain the letters entered in the filter box.

A second filter option is available for columns containing default content (e.g., status) by simply selecting one or more attributes from a pre-defined list.

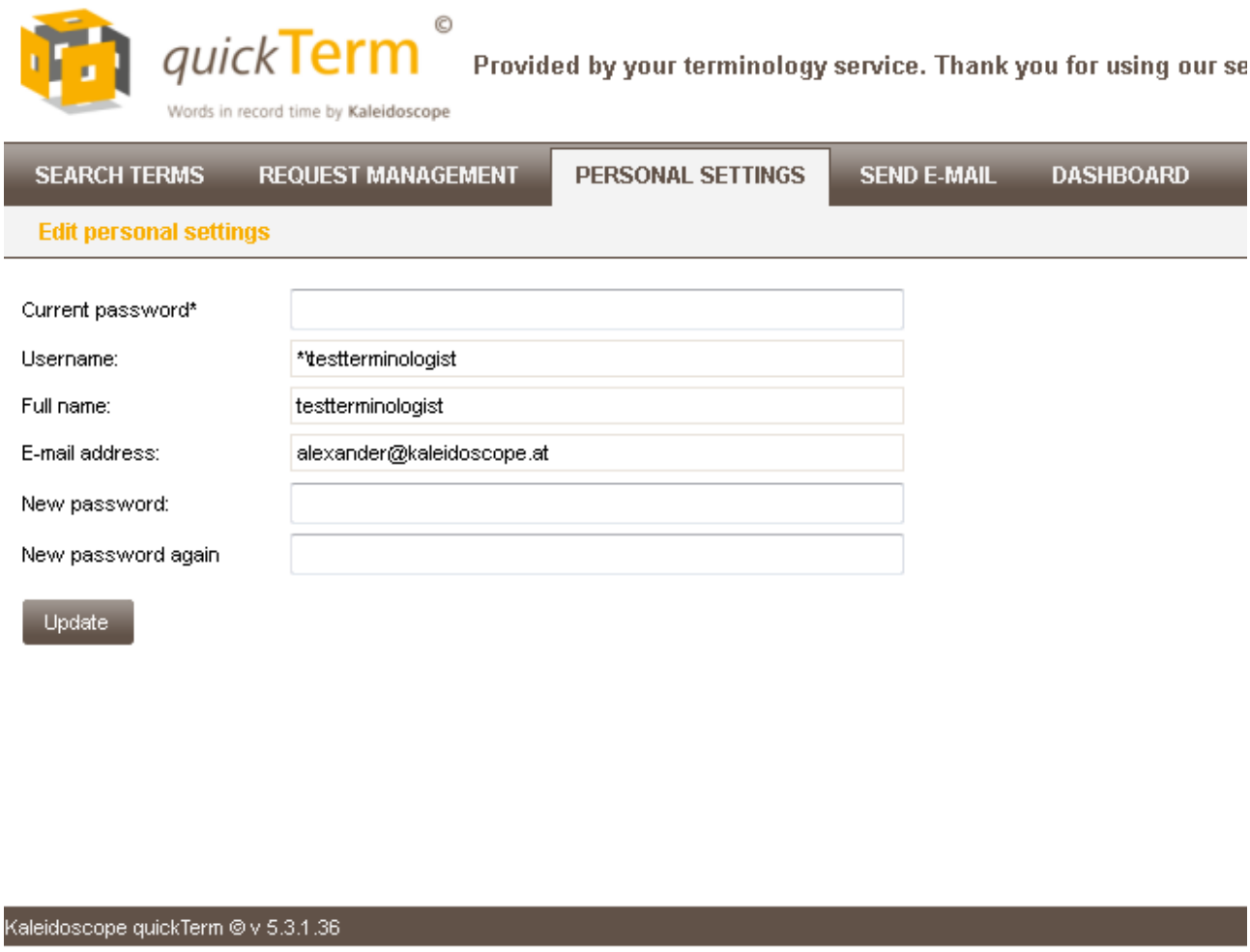
# 17 Personal Settings

In Personal settings you can change your user name, full name and e-mail address and *Save* the changes. These settings are saved on the server.

If the user does not have permission to save changes (this is configured by the administrator in the user group settings), the changes will only be valid for the session in progress. As soon as the user logs out and then back in again, the previous values will be active. They will therefore NOT be saved on the server.

You can define the following settings here:

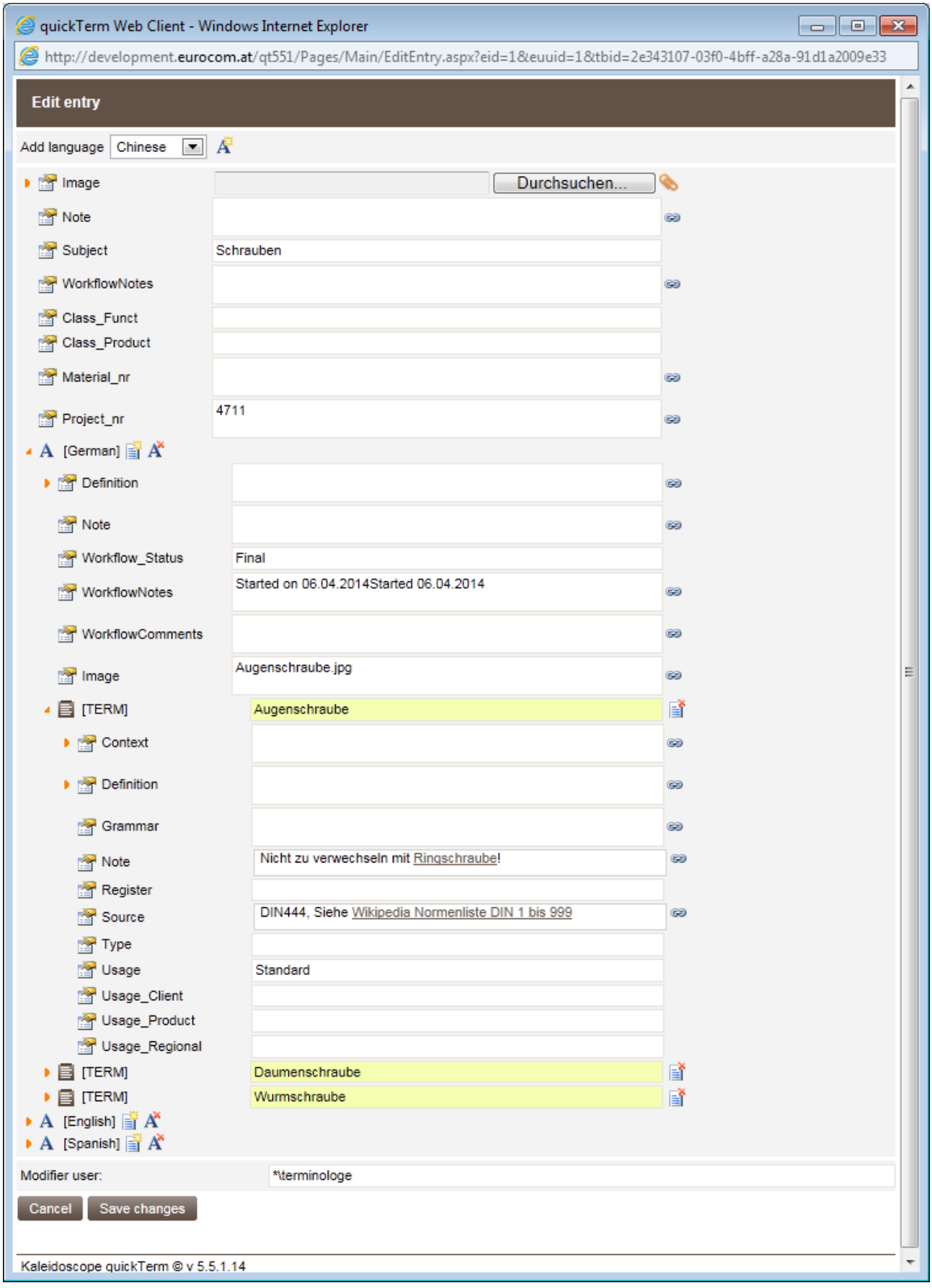
- *User name, full name* and *E-mail address*: This information is required for e-mail notifications accompanying term requests as well as to log the person initiating the request in the case of logged entries. If you have already been created as a user in the domain, this information is already loaded.
- *New password* and *New password again* are only displayed to quickTerm users, not to Windows users. This option allows you to set a new password. In order to do so you must enter your *Current password*.




*Personal Settings*

# 18 Edit entry

This feature is available to any user group except for end users and administrators. It has to be activated by the administrator.




*"Edit entry" dialog*

a) Open the entry by running a search for it.

b) Click on "Edit entry".

⇨ The "Edit entry" dialog box opens. The entry has to contain at least one language before it can be saved.

By clicking on the Button you can delete the content of the respective fields of an entry.

By clicking on the button you can add new languages to the entry. If a translation task is already running for a certain language, this language will not be shown in the list and you cannot add it.

By clicking on you can delete a complete language from an entry. Before quickTerm deletes a language, you will be asked if you are sure.

a) Eventually, click on "Save changes" to save the changes to the termbase.

**Locked fields and locked languages**

quickTerm automatically locks fields and languages for which a translation or edit task are currently running. The ⚠ icon indicates that these fields are locked.

# 19 Opening quickTerm Web with Parameters

It is possible to open quickTerm Web directly with parameters.

- Log in in with a predefined user:

  `[qtweb]?user=[Username]&pass=[Password]&cl=[Client]`

  `e.g.: http://quickterm.testcompany.at/qt/Pages/Main/Search.aspx?user=testterminologist&pass=testterminologist&cl=testclient`

- Run a search immediately

  `[qtweb]?term=[Term]&sourceLang=[Source language (optional; e.g.: „eng-GB“)]&sourceLangType=[Source language type]&searchMode=[Search mode]&tbid=[Termbase ID]&tbname=[Termbase name (as an alterative to the termbase ID)]&showOnly=[TRUE/FALSE; If „TRUE“, then this search will not change any user settings, such as termbase, source language etc.]`

  `e.g.: http://quickterm.testcompany.at/qt/Pages/Main/Search.aspx?term=test&sourceLangType=English&searchMode=Normal&tbname=test_db`

- Directly display a certain entry number:

  `[qtweb]?euuid=[Entry ID]&sourceLang=[Source language (optional; e.g.: „eng-GB“)]&sourceLangType=[Source language type]&tbid=[Termbase ID]&tbname=[Termbase name (as an alterative to the termbase ID)]&showOnly=[TRUE/FALSE; If „TRUE“, then this search will not change any user settings, such as termbase, source language etc.]`

  `e.g.: http://quickterm.testcompany.at/qt/Pages/Main/Search.aspx?euuid=80&sourceLangType=English&tbname=test_db`

- Request a term

```
[qtweb]/Pages/Main/TermRequest.aspx?term=[requested
term]&sourceLang=[Source language (optional; e.g.
„eng-GB“)]&sourceLangType=[Source language
type]&tbid=[Termbase ID]&tbname=[Termbase name (as an
alterative to the termbase ID)]&customUsrName=[Name
of the requestor]
```

```
e.g.: http://quickterm.testcompany.at/qt/Pages/Main/
Search.aspx?
term=test&tbname=test_db&sourceLangType=English&tbnam
e=test_db&customUsrName=Mr.%20Sample
```

- Request an alternative term

```
[qtweb]/Pages/Main/TermRequest.aspx?term=[requested
term]&sourceLang=[Source language (optional; e.g.
„eng-GB“)]&sourceLangType=[Source language
type]&tbid=[Termbase ID]&tbname=[Termbase name (as an
alterative to the termbase ID)]&customUsrName=[Name
of the requestor]&euuid=[Entry ID]
```

```
e.g.: http://quickterm.testcompany.at/qt/Pages/Main/
Search.aspx?
term=test&tbname=test_db&sourceLangType=English&tbnam
e=test_db&customUsrName=Mr%20Sample&euuid=80
```

**[qtweb]**

[qtweb] is the base URL of your quickTerm server, for instance `http://quickterm.testfirma.at/qt/Pages/Main/Search.aspx`)

**Spaces**

Spaces in the URL have to be escaped with "%20".

# Glossary

## Approval

In quickTerm, approval is the process that a term must pass through before it is accepted by all decision makers. In the final stage, the term is subjected to a last check and final approval from the terminologist. After this, the entry is considered to be approved.

## Approval task

The terminologist or translator can send an entry to approvers for a particular language who can then approve or reject it. This process is called Approval.

## First-Wins Procedure

Granting approval via the First-Wins procedure means only one member of a group has to cast a vote. This vote will set the entire group vote status.

## Minimum Agreement Procedure

In contrast to the First-Wins and necessary votes procedures, the minimum agreement procedure requires a specific number of users in a group to approve an entry in order for the group's approval to be granted. A group's approval is only deemed valid once the number of votes in agreement has been reached. Negative votes are not counted.

## Necessary Votes Procedure

In contrast to the First-Wins or minimum agreement procedure, a number of total votes is defined that has to be cast before the group's decision is deemed valid. The decision does not have to be unanimous.

## Requests

In quickTerm, requests are assignments that may be sent to the terminologist by any user, depending on the user authorization. Requests are either term requests, change requests or translation requests. The terminologist can then reject, implement or convert these requests into a task.

## Tasks

In quickTerm, tasks are requirements set by the terminologist to be completed by his staff. They comprise edit tasks, approval tasks and translation tasks.

## Term

In terminology, a term is a "word" expressing a certain reality. In terminology, a "concept" is a certain reality, for instance a particular feature on a phone. The term "speed dial" would be a possible way to express the concept. Concepts are also called entries in the MultiTerm context.

## Term request

A term request is generated when a user searches for a term that does not exist in the termbase and would like the term to be added to the termbase. Term requests go to the central terminology team that decides which terms are to be created in MultiTerm and how they are to be created. This is followed by the approval of the entry.

## Translation Suggestion

A translator can suggest a (new) foreign-language equivalent for an existing entry. This is referred to as a translation suggestion.

## Translation task

A terminologist can assign a new entry to a translator so that the foreign-language equivalent to the source-language term can be researched. This is referred to as a translation task.

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